



# Strategic Plan 2021 - 2025



**Growing. Protecting. Educating.**



# Strategic Plan 2021 - 2025

Bring the Trees Atlanta Family Together in One Home

Integrate and Enhance Programs and Initiatives

Strengthen Existing Partnerships and Build New Relationships

Improve Public Awareness of Trees Atlanta's Impact

Further Develop a Diverse, High-Performing Team

## Our Mission Statement

Trees Atlanta is a nationally recognized nonprofit citizens' group that protects and improves Atlanta's urban forest by planting, conserving, and educating.

# Happy 40th to Trees Atlanta!

Established in 1985, Trees Atlanta is looking forward to celebrating its landmark fortieth birthday with ambitious plans for the five years leading to 2025. As always, we look back with pride and forward with big ideas.

While we benchmark ourselves against organizations with similar goals, we always aspire to be our best.

Through the combined efforts of our employees, our dedicated and ever-growing community of volunteers, and our continuing partnerships, we've not only planted and maintained 140,000 trees, but we've succeeded in educating the community—from our young summer campers to our Youth Tree Team high school job training program and numerous adult education offerings. 2020 also marked the seventh consecutive year we were recognized by Charity Navigator's top 4-star rating for strong financial health.

With a new and improved operations center and headquarters, we're confident we will be able to accomplish even more to keep Atlanta “the city in the forest”. Looking to the future, our Board of Directors and staff have identified five major goals to be accomplished in the next five years as a strategic plan to further Trees Atlanta's impact.



*Greg Levine*  
Co-Executive Director &  
Chief Program Officer



*Connie Veates*  
Co-Executive Director &  
Chief Operating Officer



*Volunteers and staff work year-round to plant, prune, mulch, and care for trees throughout metro Atlanta.*





## It All Started with One Woman 35 Years Ago

Marcia Bansley led the charge in the early years of Trees Atlanta. She was hired as its first Executive Director in 1985. For its first decades, she was the face and voice of Trees Atlanta and a one-woman force of nature advocating for Atlanta’s tree canopy and its urban green spaces.

The organization was the brainchild of Dan Sweat and Larry Fonts of Central Atlanta Progress. They were inspired by Treescapes Dallas and felt strongly that Atlanta’s trees needed protection during a phase of booming development.



The Georgia Pacific Foundation chipped in for a part-time executive director. Marcia, then a newly graduated lawyer with a history of working on environmental causes, applied. While she was the only official employee for years, she was empowered by a dedicated corps of volunteers and passionate “tree people.”

Under Marcia’s leadership, Trees Atlanta launched a capital campaign that resulted in the extensive and thoughtful renovation of an industrial warehouse in the historic neighborhood of Reynoldstown and created the LEED Platinum Certified Kendeda Center at 225 Chester Avenue.

When Marcia retired in 2010, Connie Veates, a longtime board member with corporate and executive credentials, and Greg Levine, a degreed landscape architect and certified arborist who had served as Trees Atlanta’s Program Director for 15 years, were named as Co-Executive Directors.



Connie serves as Chief Operating Officer and Greg as Chief Program Officer. Working together in a uniquely effective co-executive capacity, they have increased Trees Atlanta's impact exponentially.

Under their leadership, Trees Atlanta marked the planting of its 100,000th tree in 2014 and the 140,000th tree in 2020.

## COVID-19 IMPACT

Shortly after the Board of Directors' Strategic Planning session in early 2020 the nation began to be significantly affected by the COVID-19 pandemic. Trees Atlanta quickly focused on two key strategies: 1) to keep employees meaningfully employed, and 2) to continue to fulfill Trees Atlanta's mission.

Although many short-term adjustments were made to meet the immediate needs required to respond to the pandemic, the organization remained dedicated to the long-term goals of its existing strategic plan, while remaining mindful of plans outlined in this document.

## DIVERSITY AND INCLUSION

As part of the strategic planning process, Trees Atlanta sought input from staff, volunteers, and donors, asking: what is done well and what can be improved? A consistent suggestion was for Trees Atlanta to deepen and broaden the ways it reaches out to and engages diverse community members and to review how it collaborates with existing organizations representing historically disenfranchised areas. Trees Atlanta's employees expressed a desire to learn more about how they can work better with and within the communities they serve. Internal workshops with employees have already begun to address these issues. This strategic plan includes early takeaways identified from those conversations which will continue in the years ahead.

# ORGANIZATIONAL GOALS FOR 2021 – 2025

The strategic plan addresses five goals. In addition to the strategies identified below, a complementary document will be created that lists specific actions and tactics that will be used to monitor and measure progress throughout the 5-year timeline.

## GOAL 1:

### **Bring the Trees Atlanta Family Together in One Home**

Since the last strategic planning period (2016-2020), Trees Atlanta added two leased satellite locations in addition to its main office and facility at the Kendeda Center in Atlanta's Reynoldstown neighborhood. The TreeHouse, nearby in the Old Fourth Ward, opened in 2015 as the education and research center. Trees Atlanta at Murphy Crossing in Oakland City was added in 2018 as a much needed operational center for trucks, heavy equipment, plant material, and maintenance supplies.

Trees Atlanta needed the space of three facilities to fully support the organization's increased scale of operations in all areas of programming: planting, conserving, and educating. Although the additional locations were necessary and immediately productive, operating out of three geographically separated facilities has its challenges.



For long-term operational efficiency and organizational effectiveness, Trees Atlanta's leadership and employees agree that returning to a single facility will create more economies of scale, including fiscal (such as eliminating duplicative expenses and sharing resources) and culture (particularly for employee collaboration, communication, and professional development).

- Trees Atlanta purchased a property on the Westside Trail of the Atlanta BeltLine in Southwest Atlanta thanks to a grant specific to the purpose. Trees Atlanta will build a state-of-the-art facility as ecologically thoughtful as its current LEED-Platinum certified Kendeda Center. The new 3-acre campus will be reforested with nearly 200 trees and

restored greenspace where there is currently a warehouse in disrepair on primarily concrete-covered land.

- The new headquarters is designed to meet the organization’s current needs and will enable further growth in education, planting, and maintenance programs. Spaces are configured to allow expanded community outreach and engagement activities. An important consideration that will be monitored as the landscaping and architectural designs evolve is how to accommodate the work flow of day-to-day operations and create an accessible and welcoming center for the public, all while balancing and keeping in mind potential risks and liabilities for the safety and security of staff and visitors.
- A capital campaign has been launched to fund the construction of the new center: “Growing. Protecting. Educating.” Trees Atlanta is also pursuing alternative funding sources, including New Markets Tax Credits, the sale of the current Kendeda Center, and bridge loans to leverage early funding received from generous donors.
- The new headquarters will include attractive event spaces available for rental. Based on the success of the rental operations at the Kendeda Center, indoor and outdoor event spaces have been designed into the architectural and landscaping plans at the new headquarters. The projected rental income is expected to exceed the current rental income and will aid in offsetting operational expenses. Spaces will also be open for community meetings for nearby neighborhoods.



*Concept drawing of the future westside Trees Atlanta campus, from Warner Street looking northeast.*

## TACTICS

- Hire architect, landscape architect, and construction company to build the new center.
- Complete brownfield remediation of the site.
- Work with local and national investors to obtain New Markets Tax Credits.
- Engage the community to share the building plans to gain their insights and suggestions.
- Successfully complete the building portion of the capital campaign to raise \$7 million.
- Sell Kendeda Center.
- Move into the new building by April, 2022.

## IMPLICATIONS

There are many moving parts required to successfully fundraise while constructing a new building, applying for New Markets Tax Credits, and selling the Kendeda Center. As of the writing of this strategic plan, there remains much uncertainty created by the protracted COVID-19 pandemic and its impact on economic, social, and public health issues. In this moment, Trees Atlanta must focus on conveying the increased importance of environmental stewardship and canopy protection with its donors.

It is critical to collaborate closely with architects and landscape architects to efficiently design the building and greenspace and to engage a construction company that will build the new facility on time and within budget. Furthermore, the sale of the Kendeda Center at the budgeted price range must be completed. All of this must be accomplished while simultaneously operating a robust and growing enterprise and meeting the expectations of the served public.



*Concept drawing for outdoor classroom area and the existing grain silo that will be kept on site.*

## Goal 2:

### Integrate and Enhance Programs and Initiatives

The larger campus and unified facility will enable Trees Atlanta to further develop its place-based programming strategy for education, outreach, planting, and restoration.

- Programs should be relevant and useful to the communities served. Events must attract audiences that range in age and interests, reach new communities, and retain the interest of repeat participants.
- Accommodations will be considered to lower possible barriers to participation and engagement including transportation, parking, fees, schedules, and physical access.
- Workforce development initiatives will ensure the future pipeline of employees for Trees Atlanta.



- The One Million Trees Initiative and the Green Infrastructure program will be embraced as model demonstrations of applying natural solutions to urban development challenges.
- An updated planting palette of native plants is needed to improve long-term canopy success, particularly as it relates to local impacts from climate change.
- Managing the equipment expansion and staffing needs that result from all these new initiatives will require logistics planning to maximize efficiency.
- The achievements and lessons learned by the Forest Restoration team will be further developed to improve and grow the program.

*Councilmember Marci Overstreet, City Council District 11, plants trees at Greenbriar Mill Apartments in SW Atlanta during Plantlanta 2020.*

## TACTICS

- Review all current programming and develop a plan to attract diverse audiences and communities, while still retaining current constituents.
- Identify potential barriers to attracting diverse audiences and develop an action plan to overcome those barriers.
- Form a staff-led task force to develop recommendations about how to better partner with local nonprofits and community members that represent and reach broader audiences.
- Expand the Youth Tree Team model to create an adult workforce development program.
- Implement and track the progress and impact of the One Million Tree Initiative.
- Implement and track the progress and impact of the Green Infrastructure program.
- Change the palette of native trees and plants to better reflect the anticipated requirements for future regional climate change conditions.
- Develop a plan to manage plant material, staff, and equipment in an efficient manner.
- Evaluate the forest restoration procedures and management planning to bring the program to its next level.

## IMPLICATIONS

Trees Atlanta will need to develop processes to reach new constituents and run its operation more effectively while continuing its existing work and building a new building. This will require increased engagement among the board, staff, and volunteers to help analyze its current work and develop plans to do more, better.



*Trees staged for pickup at the 2020 “virtual” Annual Tree Sale.*

# Goal 3:

## Strengthen Existing Partnerships and Build New Relationships

Trees Atlanta enjoys strong and strategic partnerships with organizations across multiple segments: municipal, corporate, community, housing and development, and nonprofit. Collaboration with like-minded organizations is the key to amplifying the reach and impact of its work.

Due to the brand recognition and broad community goodwill hard-earned by Trees Atlanta, strategic partnerships can help to lift awareness of other organizations and increase partners' capacities to serve more communities.



*Long-leaf pine savanna and native bog garden on the Westside Trail, Atlanta BeltLine Arboretum.*

- Trees Atlanta will analyze existing and potential relationships to strengthen and expand them. A Board subcommittee will be formed and dedicated to advocacy. The subcommittee will define advocacy and outreach in context of Trees Atlanta's mission.
- An understanding of the unique needs and expectations of the residents and communities nearby the new headquarters is required. Strategic partnerships can help Trees Atlanta gain new competencies or allow opportunities to be redirected to other specialized organizations.

- Volunteers have always been a crucial part of Trees Atlanta’s success. As the footprint and impact of the organization grows, the recruitment and retention of volunteers will also be monitored for diversity and representation that reflects the communities in which they serve. The overall volunteer experience will be improved with more skills training to increase effectiveness at volunteer projects and to foster meaningful engagement and higher volunteer satisfaction.
- Relationships with real estate developers and building contractors will be formed through a pilot certification program for canopy protection. It will be designed in collaboration with developers and contractors who commit to following the guidelines.
- The Atlanta BeltLine has become a major recreation pathway and tourist destination in the city. Trees Atlanta is a landscape contractor as well as key program partner responsible for the planting of greenspaces and installing educational demonstrations along the trail. It has greatly contributed to the creation of a beloved linear arboretum of trees and plants, including the meadows of native wildflowers and grasses. Currently unfunded by Atlanta BeltLine or other sources are plans for long-term maintenance of the Atlanta BeltLine Arboretum. Trees Atlanta will determine its role and scope of work to maintain the greenspaces it has installed.

## **TACTICS**

- Analyze all current partnerships and determine how to strengthen them.
- Evaluate future program needs and gaps and explore strategic partnerships to help fill those gaps.
- Determine path to increase the number and diversity of volunteers.
- Determine how to improve volunteers’ experience.
- Design and pilot a certification program for developers and contractors.
- Collaborate and develop a plan with its partners for the long-term maintenance of the Atlanta BeltLine Arboretum.

## **IMPLICATIONS**

It will be time-consuming and labor-intensive to develop strong plans to increase and improve the volunteer experience, define a path toward advocacy, improve existing partnerships, and develop relationships with developers and contractors. Additionally, Trees Atlanta must work across multiple organizations to plan for and find funding for long-term maintenance of the Atlanta BeltLine Arboretum.

# Goal 4:

## Improve Public Awareness of Trees Atlanta's Impact

Atlanta started out in a forest – and Trees Atlanta has kept it there! People who walk along its tree lined neighborhood streets can attest that Atlanta is indeed a city in the forest. Anyone flying into Atlanta's airport has a bird's eye view of the city's iconic canopy. Look down and one



sees expanses of green, with a scattering of skyscrapers popping out among the trees.

Before Trees Atlanta's founding in 1985, Atlanta's downtown landscape was almost barren of trees. Thirty-five years and 140,000 trees later, the evidence of its hands-on work is abundant. Atlanta remains the "City in the Forest" in a large measure due to Trees Atlanta. However, Trees Atlanta's challenge is to spread the word of the work it has done.

- Trees Atlanta must create marketing phrases that are simple, inspirational, and shareable on multiple media. Recognition and awareness should be bigger and broader, and by increasing its marketing impact and reach, Trees Atlanta can improve its capacity and outcomes. Fresh and approachable data and visual formats can show the results, impact, and achievements of its work in a clear and straightforward way.
- Segmentation will be used to target specific constituent groups and to focus its messaging and minimize communication overload.
- The expertise and real world experiences of the staff will be shared with academic researchers, teachers, and peer organizations. Trees Atlanta will continue contributing its thought leadership as an ecologically-forward urban community forestry nonprofit.
- The signs found throughout metro Atlanta that say "Another Planting by Trees Atlanta" is ingrained as an iconic part of the streetscapes of the city. Historically, many people first become aware of Trees Atlanta because of the presence of these street signs. Additional ways to increase the physical brand presence will be created and implemented in the areas served by Trees Atlanta.

- Hard-to-reach audiences – such as schools, churches, and communities in the digital divide – will get more attention via new outreach strategies.

## TACTICS

- Develop a multi-pronged, long-term strategic marketing plan focused on messaging to diverse audiences and specific intent. Include messaging themes, channels/media, and timing for internal (i.e., staff and board) and external audiences.
- Enhance communications channels to broadcast and share thought-leader pieces that demonstrate Trees Atlanta's expertise of community forestry and urban ecology.
- Improve reach and target audiences using data tools, such as Salesforce.
- Research and define alternate physical brand marketing (e.g., on company vehicles, at the new headquarters, throughout the community) to further solidify the Trees Atlanta brand throughout metro Atlanta.
- Research and adopt best practices to engage community members (especially near the new headquarters) and collaborate with community partners.
- Engage board members to explore how Trees Atlanta can improve its messaging concerning advocacy.

## IMPLICATIONS

There is much to be done to improve outreach and community engagement through marketing and advocacy. There are limited financial resources and staff capacity to develop and execute a long-term strategic marketing plan while working on demanding operational goals; therefore, assistance from board members and skilled volunteers will be needed.



*In response to the pandemic, the City of Atlanta rapidly imposed Stay-at-Home orders, and Trees Atlanta pivoted to resume Education, Outreach, and Fundraising events on Zoom and other virtual platforms.*

# Goal 5:

## Further Develop a Diverse, High-Performing Team

Improved recruiting strategies will help us diversify Trees Atlanta's workforce, retain valued employees, and create a workplace culture that achieves high employee satisfaction and elevates Trees Atlanta's brand and reputation. A proficient and happy workforce is more motivated to be positive ambassadors for the organization and invested in fulfilling its mission.

- A new facility where all employees will be centralized will enable better cross-organization collaboration. While Trees Atlanta waits to move into its new facility, teams will continue to seek ways to work across current multiple locations and unify its organizational culture.
- Trees Atlanta will identify training needs and create curriculum and implement continuing education programs that build both technical and soft skills, including those designed to increase cultural competence and proficiency working with diverse populations.



- Talent development techniques will include a review of recruiting outreach and interviews, new hire onboarding, supervisor training, leadership development, and coaching.
- As staff turns over and new hires join the organization, employee diversity will more fully represent the communities that they serve.
- New board member recruitment will seek individuals from a broad range of professional and cultural backgrounds and who may provide needed skills beyond fundraising.
- A board skills matrix will be used to facilitate the board's engagement in the staff's day-to-day processes.
- A set of metrics to measure progress toward increasing board and staff diversity will be set, tracked, and communicated.

## TACTICS

- Create a board subcommittee to study diversity, equity, and inclusion.
- Set recruiting and selection goals to increase diverse representation on the Board of Directors and Advisory Board.
- Review salary/wage compensation, benefits, and culture to determine the key drivers of employee retention.
- Organize staff-led task forces to develop recommendations about how to define and achieve increased diversity and inclusion at Trees Atlanta.
- Organize a staff-led task force to develop recommendations about how to engage more Black organizations and diverse communities in its work.
- Keep working on engaging employees, collaborating, and team-building across multiple locations while the new building is designed, and staff are reunited at a single facility.
- Develop measurable goals and desired outcomes for each board subcommittee and task force, and include a comprehensive list of activities and a plan of action to implement final recommendations.



## IMPLICATIONS

The urgency of this work increases as Trees Atlanta plans its move to a new home on the westside of Atlanta where nearby residents are less familiar with the organization (than are eastside communities). The challenges of this goal are increased by the logistics of constructing the new building, modifying programs and processes, and building new relationships as part of the move to the westside. Furthermore, the continuing uncertainties related to COVID-19 pandemic safety precautions have unknown implications for the implementation of these and other strategies.

Ultimately, the expected benefits from this work will set up Trees Atlanta for many decades of success and growth in the changing social and environmental landscapes of Atlanta. It will take Trees Atlanta's leadership team, all staff members, and the Board of Directors to research best practices, develop recommendations for improvements, and ensure that changes are implemented in a timely manner to build a more inclusive, healthy organization.

# STRATEGIC PLANNING PROCESS

Below are key dates and events that took place as part of the process:

- **October 2019** – Hired Lori Addicks to facilitate the strategic planning process
- **November 2019** – Surveys developed and sent to staff, volunteers, partners, leaders and managers, and board members
- **December 2019** – Managers and Directors met to review survey responses and develop themes. Coxe Curry completed the Capital Campaign Feasibility study and reviewed their findings with Trees Atlanta’s leadership, the Capital Campaign Committee, and the Board of Directors
- **January 2020** – Board and Trees Atlanta leadership retreat conducted to review all themes and develop 5 goals
- **February – August 2020** – The Strategic Plan drafted and edited
- **October 2020** – Final draft completed for the 2021 – 2025 Strategic Plan
- **November 2020** – Board of Directors received final strategic plan



# APPENDIX A:

## KEY FINDINGS FROM DONOR FEASIBILITY STUDY

Coxe Curry conducted 22 confidential interviews with 27 individuals between September 11 and November 14, 2019. Interviews served as an important barometer of the organization's presence in the community and provided insight into the receptivity of a future campaign. Below are key findings from the study.

### PERCEPTION AND AWARENESS

**Reputation:** Interviewees universally agree that Trees Atlanta has a strong reputation within the metro Atlanta community. Interviewees acknowledge and appreciate the important role the organization plays in protecting and replenishing the tree canopy at risk with rapid growth and development.

*Selected comments:*

- “I love their search for best-in-class practices.”
- “They can’t plant enough trees to keep up with the destruction. How is Trees Atlanta advocating in a proactive way to limit destruction of trees?”

**Financial Strength:** Interviewees also commended the organization for its strong financial position, identifying sound fiscal management and growth in fundraising while increasing program offerings and depth.

*Selected comments:*

- “We think Trees Atlanta is important, well-run, and efficient. This effort makes sense. The mission is simple, and we have the utmost confidence that Trees Atlanta is doing the right thing.”
- “I really like their earned revenue. They have demonstrated strong fiscal management through the great recession and they have grown as an organization.”

**Donor Stewardship:** With few exceptions, donors praised Trees Atlanta for good cultivation and stewardship.

*Selected comments:*

- “As far as stewardship, everything is on time and thoughtfully, appropriately done. Their submissions are tight and professional. Our latest meeting was a nice combination of

honest assessment of challenges and the latest of what is going on with them. It was very appreciated.”

- “As a donor we don’t feel like we have been kept informed. Donor stewardship is a challenge, but I have not seen a clear communication of “this is what we do, why we do it, and why it all makes sense.”

**Advocacy:** Among interviewees there was mixed input on Trees Atlanta’s advocacy programs. While some interviewees want to see Trees Atlanta do more, most interviewees sought to understand what the organization’s current advocacy efforts involve and what role these efforts play within the larger community.

*Selected comments:*

- “We are familiar with Trees Atlanta, but I think that the trustees need a little more education – an update on how they engaged with the community and what they are doing. Advocacy is important and relaying that message is good for the trustees to hear.”
- “It may be time for Trees Atlanta to step out more in the advocacy effort. There is no pattern or control over development these days. How is impact measured on Atlanta Canopy Alliance work? What is the outcome?”

**Long-term Impact:** A few interviewees wanted to understand better Trees Atlanta’s long-term impact and results in regards to tree plantings and restoration. Questions were also asked about Atlanta BeltLine Arboretum plantings and the impact future transit might have on the current Arboretum.

*Selected comments:*

- “Has the inventory been done on all trees planted, as outlined in the last campaign?”
- “I would love to see a dot map for forest restoration. What is protected and where?”

**Preliminary Case for Support:** The preliminary case for support was well-received. Interviewees believe the components are needed and well-aligned with the mission of the organization.

*Selected comments:*

- “The case is really thorough. It speaks to accomplishments over the years, and I learned a lot.”
- “What they are planning is great. These components are all needed.”

**Relocation:** Interviewees were receptive to Trees Atlanta’s proposed move to Atlanta’s Westside and understand the value for the organization to be located along the Atlanta BeltLine Arboretum. A few questioned how the relocation of the education programs from the current TreeHouse may affect participation.

*Selected comments:*

- “I’m glad they went ahead and bought the property. That was an opportune time. A green site is desperately needed in that area. Taking advantage of a property that needs refurbishing is positive.”
- “I’m immensely enthusiastic. Greg and Connie are real visionaries, and I trust their judgement. My only concern is that the education space is on the Eastside Trail. Getting to that new space may be a challenge for some.”

**Community Engagement:** Several interviewees are interested to learn more about how Trees Atlanta will actively engage with its new Westside neighbors, specifically around targeted underserved populations.

*Selected comments:*

- “I would like to know what they are doing for the underserved in the area.”
- “There are a lot of opportunities for community engagement in the Westside neighborhood. They should hire local counselors who can engage with the kids authentically. They need to be sure they are deepening their culture competency.”

**Operating Efficiencies:** Acknowledging the limitation of Kendeda Center facilities, interviewees appreciated Trees Atlanta’s plans to consolidate operations into one facility. The organization was applauded for conservative building plans enabling operating efficiencies and combining program sites without over-expanding the facility’s footprint.

*Selected comments:*

- “They are in a tough position with the size of Kendeda Center and limited capacity for growth. It is like buying your first house. It is time for them to move on to a ‘forever home’.”
- “They are consolidating in a lower rent district. I like that the square footage is comparable to what they have now. They aren’t expanding too much.”

**Sharing Space:** The co-location of The Conservation Fund in the new building is viewed by several interviewees as a welcome collaboration.

*Selected comments:*

- “I like that The Conservation Fund is locating with them. The more collaboration within the environmental nonprofits, the better.”
- “I like that they are going to house The Conservation Fund.”

**Planting Sites:** Several interviewees expressed there is a heightened awareness around the need for increased tree planting and protection. While Trees Atlanta’s role in tree plantings and work along the Atlanta BeltLine Arboretum is deeply valued by interviewees, there are a couple of interviewees who requested a breakdown of tree planting needs and geographic plans for plantings.

*Selected comments:*

- “We are not a city of trees downtown. Are they planning more plantings downtown? From tree planting to urban ecology to tree movement to education --- Trees Atlanta’s evolution makes sense.”
- “Expanding the tree canopy – it is easy to understand the need. We also like the forest restoration work.”

**Return on Investment:** Interviewees appreciate seeing the outcomes and demonstrated growth from the investments in environmental education through the Branching Out Capital Campaign.

*Selected comments:*

- “The last campaign was really successful, and they went above and beyond with it. What they have done with what they have is really great. I really like their education for kids. It is the best way to change society.”
- “Our focus is on the environment and environmental education, so they are a great fit for us. It’s great to see growth in the organization.”

**Certification:** While Trees Atlanta’s partnership with the Urban Ecology Center and proposed plan for the certification of the new facility was interesting to several interviewees, most noted that the certification alone would not be a driving factor for their potential giving.

*Selected comments:*

- “What type of certification is the UEC? Is it really certification? What does this ‘get’ Trees Atlanta?”
- “The UEC certification may be most appealing to individual donors.”

**Construction Budget:** Several interviewees requested more detailed financial information, including a breakdown of the building and site work budgets and an annual operating pro forma.

*Selected comments:*

- “Construction budgets are scary and it is hard to know the full costs, especially projecting 2 years out. We like to see budgets as buttoned down as possible. \$2 million in landscaping and site improvements – what is the breakdown?”
- “This seems like a good decision although I’d still like to see the detailed budget and pro forma.”

**Leadership:** Overwhelmingly interviewees reaffirmed their continued confidence in Connie Veates and Greg Levine. The duo was praised both as individual leaders and as joint partners in the unique co-director’s relationship.

*Selected comments:*

- “I have genuine admiration for the job Greg and Connie have done. They have followed through on what they said they would do.”
- “I am pleasantly surprised about how well the co-executive director relationship has worked out. It is a tribute to Connie and Greg, and it is a great endorsement for the project and for the organization.”

**Representation:** Many interviewees noted and recognized long-time leaders and Trees Atlanta friends on the Board of Directors and Advisory Board. Several interviewees acknowledged broad corporate representation, although the individual member representatives did not carry name recognition.”

*Selected comments:*

- “They have a core of long-time volunteer leadership that is immensely knowledgeable about the organization.”
- “The board has great representation for corporations, but I don’t see strong community representation.”

**Developers:** Some interviewees feel that a relationship between Trees Atlanta and the developer community is vital to ongoing conversations regarding tree protection and planting.

*Selected comments:*

- “Developers of the buildings need to help leverage their contacts to make change. Does Trees Atlanta have a strategy to engage developers?”
- “Who are the big Westside developers? They need to be at the table.”

**Larger Campaign:** Interviewees expressed initial concern at the large increase in campaign size compared with the \$5 million fundraiser for the Branching Out Capital Campaign. However, when accounting for gifts secured to-date and anticipated revenues from the sale of Kendeda Center and New Markets Tax Credits, most interviewees feel that the remaining philanthropic raise is within reach of Trees Atlanta at this time.

*Selected comments:*

- “I was worried about the \$16 million, but recognizing what they have lined up, the path to \$7 million seems doable.”
- “This is a larger campaign, but they are a strong organization now. We are candidates for capital and tree planting funding.”

**Intent to Give:** Throughout the feasibility study process, twenty-two (22) interviews were conducted. Twenty-one (21) of the interviewees indicated interest in supporting the campaign. Several current donors indicated they will consider capital investments above and beyond their continued annual support. Only one interviewee shared that they will not consider capital support, but is committed to continued support of Trees Atlanta’s annual operations.

*Selected comments:*

- “We are candidates for capital and tree plantings. We would like to see more resources to help community partners. Forest clean-up makes sense.”
- “We are focused on supporting organizations for the long-term, and we would welcome a conversation about support for this campaign.”

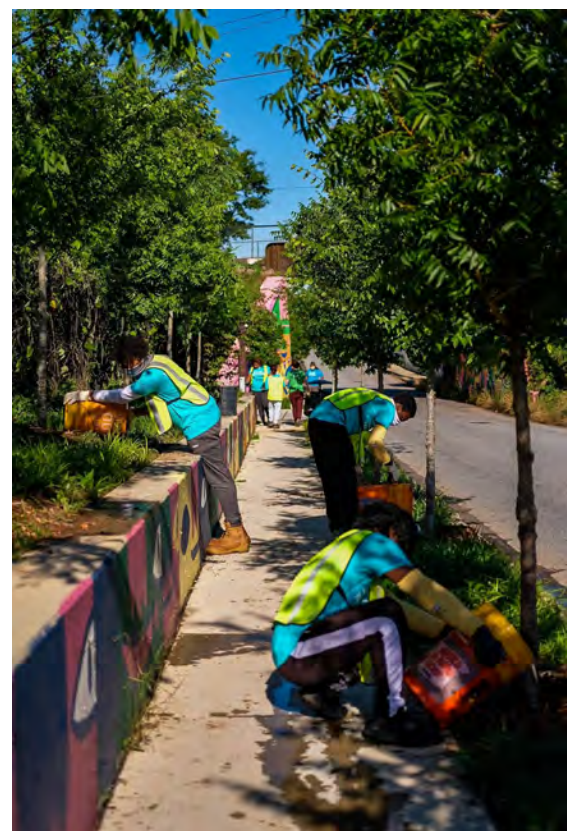
## **OTHER RECOMMENDATIONS**

- For those closely in the know, Trees Atlanta has actively worked to deepen its role in advocacy focusing on regulations and protection policies. However, for many of those interviewed through this study, most of Trees Atlanta’s work in this area is not known or visible. Trees Atlanta should continue to strategize how best to communicate the organization’s active role in advocacy efforts region-wide.
- As Trees Atlanta continues to build a partnership with the Urban Ecology Center (Milwaukee) and develop a path to certification, Trees Atlanta should develop language

and talking points about the unique resources this relationship will bring to the organization and its programs. The talking points should also include how this new certification can be completed by other interested local nonprofits, noting the potential synergies created by this shared experience.



*First planting event to launch the One Million Trees Initiative with (l-r) City of Atlanta arborist Jasen Johns, Arbor Day Foundation President Dan Lambe, Greg Levine, and Atlanta Councilmember Matt Westmoreland on Georgia Arbor Day 2020; Volunteers marching in the Inman Park Parade 2014 to celebrate its 100,000th tree planted; Youth Tree Team on the job training in the Atlanta BeltLine Arboretum.*



# APPENDIX B:

## SURVEY DATA FROM VOLUNTEERS, DONORS, PARTNERS, BOARD OF DIRECTORS, AND STAFF OF TREES ATLANTA

### Question 1: What are we doing well?

- Culture and Talent (85%) – passionate, enthusiastic, bright, hardworking, diverse staff with a culture to improve wages, develop career paths, show appreciation and promote from within
- Involving and Engaging Community (69%) – extensive collaboration with partners and high engagement with community volunteers
- Education, Advocacy and Communication (54%) – strong brand and reputation, high level of expertise and strong youth and adult education programs
- Commitment to Our Mission (46%) – work is aligned with our mission and have a wide impact across metro Atlanta
- Implement Impactful Programs (31%) – year-round programs that promote planting and the native ecosystem
- Financial Stability (23%) – diverse funding sources with strong leadership (Co-Executive Directors)
- Future Thinking (15%) – intentional growth

### Question 2: What could we be doing better?

- Making the economic case for the long-term benefits of trees and greenspace (46%) – tell our story better, work more with developers, homeowners, businesses and municipalities, communicate more results, accomplishments, and impact, train our partners and municipalities to care for green space, communicate sustainability practices (composting, recycling, awareness, modeling)
- Align/Connect to Mission (38%) - more robust outreach to more diverse communities and more measurement of impact
- Build Deeper/Broader Relationships (31%) – with community groups, volunteers, program participants, Westside, and more internal team bonding
- Operate more cohesively with targeted focus (23%) – reduce duplicate and overlapping efforts, increase follow-through on initiatives, improve efficiency and flexibility
- Internal Communication/Culture (23%) – losing sense of culture with separate locations, growth and change, ensure that we are measuring the right things, don't say yes to everything

- Shift to Schools Paying for Programming (15%) – engage younger students, utilize online education

### **Question 3: Vision for the Future?**

- Reputation/Brand/Credibility (69%) – viewed as credible leaders in and beyond Atlanta, expertise widely respected, on the forefront of research, leaders in environmental stewardship, outreach and consult beyond Georgia, more innovative programs, strong board leadership with tangible impact on Atlanta canopy
- Better Serve All Atlanta and Metro Area (38%) – grow deep community roots, collaborate with partners, be a friend to all Atlanta communities, be a non-threatening presence
- Unifying Robust Mission (15%) – flows through every decision made in planting, conservation and education and provides our central messaging
- Talent Management (15%) – workplace where ALL feel adequately prepared/trained in roles, greater confidence within individuals promoted to higher levels, coaching for existing high-level leaders, continuing educational/development opportunities

### **Question 4: Better alignment for future direction?**

- Talent Development (69%) – strategic staff development, cross-training of staff, hire best people possible, utilize subject matter expert to train staff, honor our staff – make them feel important and heard, recognition, offer unique opportunities
- External Communication (23%) – better storytelling, intentional in design of programming, proof that protecting trees matters, data reporting, appeal to diverse audiences ALL Atlanta-wide
- Strategic Partners/Relationships (15%) – reach more audiences, foster relationships throughout metro Atlanta, improve government relations, build relationships in area of new location
- Funding (15%) – find more funders, increase/hire more people

### **Question 5: Biggest challenges?**

- Rapid Growth of Organization/Teams (62%) – lack of team development, retaining staff, preventing burnout/turnover, lack of cohesion – staff culture, need more structure with larger organization, maintaining continuity, communication, culture, space constraints, focus on core strengths/mission vs. doing too much, ensuring unity and open-communication within organization, re-examine mission, examine our focus and roles
- Rapid Growth of Atlanta and Metro Area (38%) – growing challenges, running full speed ahead and getting behind, logistics in a spreading metro area, working again development, running out of planting space, building relationships in spreading market takes more work, need for green space maintenance and programming outpacing our ability to provide due to budget constraints
- Building Relationships with Wider Audience (31%) – working against development – not aligned with building relationships, cultivate relationships at new location, build stronger relationships with volunteers, communities, business
- Need to Re-Focus, Re-vision (23%) – need clear mission/goals, re-examine our role – do we consult vs. do the work?
- Urgency on Need for Protection/Planting Trees (23%) – collaborate/partner with other organizations to train best practices for maintaining healthy urban forest; conserving, running out of planting space

### **Question 6: What should we stop?**

- Pushing for growth until current processes are secured
- Can't say yes to everything
- Expanding beyond boundaries of mission/stated geographic area
- Reducing trees

### **Question 7: What should we start?**

- Purposeful about growth
- Demonstrate impact of work
- Community outreach with proven effectiveness
- More outreach to developers
- Pay employees more
- More staff events as a team
- Consistent communication

- Flex work space
- Flex hours 4x10s
- Variable work days
- VPN access for laptops for all
- Finding new partnerships/opportunities
- Be flexible by considering more organizations/groups as partners
- Create space(s) for employees to briefly socialize and bump into each other
- Begin a habit of taking breaks and eating together away from the work space
- Have a method for better evaluating new ideas
- Do more education with companies and industries

### **Question 8: What should we continue?**

- Doing everything we do
- Make sure data and Salesforce focus on data and have specific measurable outcomes
- Keep educating staff on up-to-date latest research and best practices
- Building deeper relationships
- Working with long-term partners
- Developing existing talent
- Stay true to core mission as we grow
- Planting trees!
- Celebrating success
- More education, outreach and advocacy

# APPENDIX C:

## DASHBOARD TEMPLATE

### Trees Atlanta Dashboard FY21

July 1, 2020 - June 30, 2021

Met or Exceeded 25% or more	Approaching Goal 20%-24%	Did not meet Less than 20%
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Actuals							
Canopy Advocacy	Goal	Q1 (Sept 30)	Q2 (Dec 31)	Q3 (Mar 31)	Q4 (June 30)	YTD Total	% of Goal
# of neighborhood and community presentations & meetings	50					0	0%
# of NPU meetings attended/presented (25 NPUs in City of Atlanta)	25					0	0%
Actuals							
Planting and Conserving	Goal	Q1 (Sept 30)	Q2 (Dec 31)	Q3 (Mar 31)	Q4 (June 30)	YTD Total	% of Goal
# of trees and seedlings planted	7,420					0	0%
# of tree care tasks performed (watering, pruning, mulching, pest treatment and fertilization)	97,595					0	0%
# of unique acres actively being restored	550					0	0%
Actuals							
Education	Goal	Q1 (Sept 30)	Q2 (Dec 31)	Q3 (Mar 31)	Q4 (June 30)	YTD Total	% of Goal
# of youth education interactions*	15,500					0	0%
# of adult education interactions*	9,800					0	0%
Actuals							
Development	Goal	Q1 (Sept 30)	Q2 (Dec 31)	Q3 (Mar 31)	Q4 (June 30)	YTD Total	% of Goal
\$ raised from individual donors and planned gifts	\$255,000					\$0	0%
# of major individual donors (\$500+)	150					0	0%
\$ raised from corporate donors	\$440,000					\$0	0%
\$ raised from contracts	\$1,695,314					\$0	0%
Actuals							
Staff and Organization	Goal	Q1 (Sept 30)	Q2 (Dec 31)	Q3 (Mar 31)	Q4 (June 30)	YTD Total	% of Goal
# of volunteers*	4,500					0	0%
# of volunteer hours served	20,000					0	0%
# of volunteer projects	800					0	0%
\$ value of volunteer hours served (\$25.86/hr)	\$517,200					\$0	0%
% of diverse board members	25%						0%

# APPENDIX D:

## TREES ATLANTA'S FY21 DEI WORK PLAN

Trees Atlanta's FY21 DEI Work Plan			
<i>Our Goal: Better represent our community by increasing diversity in our staff, our board, and through partnerships with the Black community as we protect and improve Atlanta's urban forest by planting, conserving, and educating.</i>			
Timeline	Action Items	Task Force Rec.	Contact Person(s)
July 1 – Oct. 30, 2020	<ul style="list-style-type: none"> <li>✓ Trees Atlanta DEI statement issued to the public</li> <li>✓ 3 Task Forces Created:               <ul style="list-style-type: none"> <li>TF1 – Hiring/Retention/Workplace Culture</li> <li>TF2 – Community Engagement</li> <li>TF3 – Partnerships</li> </ul> </li> <li>✓ All Task Forces met and developed a suite of recommendations which were shared with the Co-Executive Directors, Directors, and Board President.</li> <li>✓ All Task Forces shared short term recommendations at an all Staff Meeting</li> <li>✓ YTT/Community Engagement job posted</li> <li>✓ Changed health insurance policy to include full-time hourly employees with 2+ years tenure</li> <li>✓ Provided job positions and pay ranges to all employees and will be included on the staff intranet and in the Protocol Guide</li> </ul>		
By Dec. 31, 2020	<ul style="list-style-type: none"> <li>✓ Determine top priority action items for this fiscal year</li> <li>✓ Gain consensus from Directors</li> <li>✓ Share top priority action items with team liaisons</li> <li>• Share with all staff at the meeting scheduled for November 10, 2020</li> <li>• Include DEI work plan goals in Operational plan</li> <li>• Make Strategic Plan and Board By-laws available to all staff members</li> <li>• Publish a DEI update outlining steps taken to-date and intentions</li> <li>• Research and recommend anti-racism training for hiring managers</li> </ul>		Greg/Connie
		TF1	Connie/Dana/Judy

	<ul style="list-style-type: none"> <li>• Develop standard interview questions/situational exercises, train, exit interview process and 90 day performance review process</li> </ul>	TF1	Dana/Brian/Dave
	<ul style="list-style-type: none"> <li>• Determine our definition of diversity</li> </ul>	TF1	All Directors/Connie
	<ul style="list-style-type: none"> <li>• Set demographic goals before scheduling interviews</li> </ul>	TF1	Connie/Greg
	<ul style="list-style-type: none"> <li>• Develop targets and tracking method for diversity</li> </ul>	TF1	Don
	<ul style="list-style-type: none"> <li>• Hire a YTT and Community Engagement employee</li> </ul>	TF2	Dana
	<ul style="list-style-type: none"> <li>• Develop a current partners list, description of the relationship and existing partner guidelines</li> </ul>	TF3	Mike
	<ul style="list-style-type: none"> <li>• Develop a list of Black-owned businesses we could support</li> </ul>	TF3	Don
By March 30, 2021	<ul style="list-style-type: none"> <li>• Develop enhanced recruitment techniques to attract more diverse candidates</li> </ul>	TF1	Dana/Judy
	<ul style="list-style-type: none"> <li>• Schedule anti-racism training for hiring managers</li> </ul>	TF1	Judy
	<ul style="list-style-type: none"> <li>• Research and recommend training/participants/timing on Inclusion of Minorities in Community Engagement and Projects</li> </ul>	TF2	Mike
	<ul style="list-style-type: none"> <li>• Develop on-boarding process that includes leadership</li> </ul>	TF1	Mike
	<ul style="list-style-type: none"> <li>• Research and recommend professional development opportunities (to further the knowledge of employees about ways to improve their performance or equip them to apply for other jobs at Trees Atlanta) along with a designated budget and time-on-job to do the training</li> </ul>	TF1	Don
	<ul style="list-style-type: none"> <li>• Determine potential role/job description for part-time or contract HR position</li> </ul>	TF1	Connie/Greg/Dana
	<ul style="list-style-type: none"> <li>• Develop strategy for community engagement (CE committee, standard outreach procedures for staff, list of neighborhoods that we want to engage, best methods of engagement)</li> </ul>	TF2 TF3	Dana/Dave/Judy
	<ul style="list-style-type: none"> <li>• Publish update on DEI action items</li> </ul>	TF1 TF3	Connie/Greg

By June 30, 2021	<ul style="list-style-type: none"> <li>• Roll out training on Inclusion of Minorities in Community Engagement and Projects</li> </ul>	TF2	Mike
	<ul style="list-style-type: none"> <li>• Roll out professional development opportunities</li> </ul>	TF1	Don
	<ul style="list-style-type: none"> <li>• If economically feasible, hire HR position</li> </ul>	TF1	Connie/Greg
	<ul style="list-style-type: none"> <li>• Develop operational plan for community engagement and begin roll out</li> </ul>	TF2 TF3	Dana/Judy
	<ul style="list-style-type: none"> <li>• Determine roadmap for systems to enhance community engagement via Salesforce, ArcGIS, social media</li> </ul>	TF3	Don/Judy
	<ul style="list-style-type: none"> <li>• Publish update on DEI action items</li> </ul>	TF1 TF3	Connie/Greg
	<ul style="list-style-type: none"> <li>• Identify next action items to consider for next fiscal year</li> </ul>	TF1, TF2, TF3	

Full report attached.

**DEI Fall 2020 – last revised  
11-4-2020**

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*Inaugural tree planting in Downtown Atlanta. In its first year, Trees Atlanta planted 46 trees.*

**Growing. Protecting. Educating.**

**Thank you for your support!**

## Production Notes

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**Issue date:** November 10, 2020

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Trees Atlanta  
225 Chester Avenue  
Atlanta, GA 30316

501(c)3 nonprofit organization  
[www.treesatlanta.org](http://www.treesatlanta.org)