



Hawai'i Forest Institute 2024 – 2028 Strategic Plan



*Akupu Ridge Restoration Project: On August 12, 2023, 38 community volunteers cleared strawberry guava (*Psidium Cattleium*), a highly invasive species that has caused partial or complete loss of approximately 495,000 forested acres in Hawai'i.*

March 27, 2024

Table of Contents

Executive Summary.....	2
Hawai'i Forest Institute.....	3
Overview, Rationale, Strategic Process	
HFI Mission, Mandate, Stakeholders and Rebranding.....	4
HFI Today.....	6
HFI Tomorrow.....	7
Vision of the Future, Strategic Issues, Strategic Goals	
Plan Implementation.....	7
Strategic Goals, Objectives, Strategies, Tactics, Timeline, Responsibilities	
Financial Implications of the Plan.....	11
Monitoring and Updating the Plan.....	12

EXECUTIVE SUMMARY

The mission of the Hawai'i Forest Institute (HFI) is to promote the health and productivity of Hawaii's forests through forest restoration, educational programs, information dissemination, strategic partnerships, and support for scientific research. HFI's mandates are to provide forest restoration and educational programs; information dissemination relating to scientific, management and educational endeavors related to forestry, and support for sustainable forestry and scientific research relating to forestry, reforestation, forest species, forest habitats and forest products.

The organization has achieved much success as a nonprofit, delivering meaningful programs and services to the community. In 2010, the Board of Directors produced a strategic plan to review past accomplishments and challenges and to chart a future course for the organization. This effort resulted in a strategic plan that reaffirmed HFI's original mission and mandates; established a five-year vision statement; identified strategic issues; developed strategic goals, objectives, tactics and timelines; acknowledged financial implications; and created a process to monitor and evaluate the plan ([HFI 2010-2015 Strategic Plan](#)). The planning identified five strategic goals critical to future direction of the organization, as follows:

- Goal 1: Advance the mission of HFI through achieving excellence in its core mandates: scientific research, education and information dissemination.**
- Goal 2: Establish new relationships and strengthen existing partnerships and collaborative efforts to enhance HFI's contributions and effectiveness.**
- Goal 3: Increase HFI's visibility and reputation by improving public relations and communications strategies.**
- Goal 4: Increase and diversify HFI's funding and resources.**
- Goal 5: Enhance the governance and stewardship of the organization.**

The board committed to increasing the organization's 2009 annual revenue of \$56,000 to \$190,000 by 2015 in order to carry out the stated goals and objectives of the plan. HFI exceeded its commitment to increase annual revenues; 2015 annual revenue was \$254,649.

HAWAI‘I FOREST INSTITUTE

Overview

The Hawai‘i Forest Institute (HFI) is a 501(c) 3 nonprofit organization formed in 2003 by the Hawai‘i Forest Industry Association (HFIA). This Strategic Plan revisits HFI’s mission and mandates; strategic issues, goals, objectives, tactics and timelines; and creates a process to monitor and evaluate the Plan.

Rationale

Through grants, donations and volunteers, HFI has established itself as a reputable organization that disseminates information and delivers effective educational programs promoting the health and productivity of Hawaii’s forests. It has developed partnerships with other environmental, conservation and forest-related industry organizations to achieve credibility and integrity in the community. HFI has supported forest restoration and educational programs at several sites including the Ka‘ūpūlehu Dryland Forest, Kalaemanō Cultural Center, Pālamanui Dry Forest Preserve, La‘i‘Ōpua Dry Forest Preserve, Keauhou Bird Conservation Center Discovery Forest, Pana‘ewa Zoo Discovery Forest, Honolulu Zoo Children’s Discovery Forest, Hāloa ‘Āina Restoration Project, and Akupu Ridge Restoration Project. Other projects include the Locally-grown Christmas Tree Demonstration Project and Go Native: Growing a Native Hawaiian Urban Forest.

In the 2010 Strategic Plan, the Board of Directors examined the organization’s past accomplishments and challenges and charted a course for its future direction. Four key questions were central to determining the role of HFI over the life of the Plan: How does the organization define itself today? What does it intend to be? For whom? How will it get there? The planning process which reviewed the organization’s mission, mandate and who it benefits was critical to defining the future direction for HFI, determining near-term and long-term goals, identifying strategies to achieve the stated goals and acknowledging and committing to the financial implications of those decisions.

Strategic Planning Process

The 2010-2015 Strategic Plan was reviewed and updated by the HFIA Executive Director, the HFI Executive Director, and the Board of Directors. The group was asked to state in their own words the answers to two questions: “What is the mission of HFI?” and “What is its mandate?” After discussing and reviewing the mission and mandate, the board unanimously reaffirmed its commitment to the organization’s stated purpose and to its stakeholders.

In this 5-year plan, the Board re-evaluated these questions to determine if they were still applicable. While the Board unanimously reaffirmed its commitment to the organization's stated purpose and to its stakeholders, it was decided to add two additional questions in this 5-year plan. Does the name Hawai'i Forest Institute accurately describe the mission and goals of the organization? Should the Board evaluate the branding of HFI to consider conducting a rebranding process.

MISSION, MANDATES AND STAKEHOLDERS

Mission

The mission of the Hawai'i Forest Institute is to promote the health and productivity of Hawaii's forests through forest restoration, educational programs, information dissemination, strategic partnerships, and support for scientific research.

Mandates

- Provide opportunities for community members and groups to engage in hands-on conservation and restoration of native and culturally important forest ecosystems;
- Educational programs in forest management practices and forestry related enterprises; and
- Information dissemination and other scientific and educational endeavors related to forestry.

Stakeholders

The Hawai'i Forest Industry Association (HFIA) created the HFI in 2003 to broaden HFIA's constituency to include the greater community and increase opportunities for specific program funding from private foundations, corporations and individuals. The organizational differences of HFIA and HFI are: HFIA is a 501(c) 6 nonprofit trade organization sustained primarily by contracts for services and HFI is a 501(c) 3 nonprofit organization sustained through grants, corporate gifts and donations. As a result of this close relationship, many of HFI's stakeholders are HFIA members and partners, including – forest industry-related companies, landowners, land managers, research institutions, foresters, federal, state and county government entities, media and professionals in the field, and individuals interested in HFI's mission. With its broader mission HFI's stakeholders also include teachers, students, youth, educational institutions and organizations, private foundations and individuals.

Rebranding

The Board discussed conducting a rebranding process to determine if the name of the organization should be changed or a DBA or tagline be added to its name to better describe its mission and mandates. It was decided to

select a tagline to follow the name Hawai'i Forest Institute. The tagline “Mahalo ‘Āina: *Give Back to the Forest*” was selected. In addition, when discussing a project, follow the project name of the project with “A project of the Hawai'i Forest Institute”.

HFI TODAY

Current Position – Analysis of Organization

HFI has established itself as a leader in forestry and environmental stewardship through research, educational programs and information dissemination. It has a strong track record in developing forest restoration and educational programs for youth; supporting research on issues related to forestry, conservation and related industries and utilizing communication tools through the use of its website, online and printed materials, social media, and affiliation with HFIA. The strength of the organization derived from its committed and dedicated volunteer leadership and a small part-time staff. HFI has been successful in its delivery of programs and products with its partners, supporters, donors, volunteers and beneficiaries (which include researchers, students, landowners, lessees, businesses and others interested in forestry) conveying that the organization's programs meet or exceeds their expectations. In addition, funders and supporters view HFI to be a credible and trustworthy organization and have provided resources to help the organization build capacity and expand its environmental stewardship.

HFI has name recognition and is respected in the forestry and environmental community and is starting to get known in the greater community. It is also often confused with HFIA, its founding organization. HFI has a small, but growing, donor base with most of its funding coming from grants. Funding is often “one-time only grants” and restricted to specific projects with limited funds allocated to operations. This has slowed the organization's growth. HFI's board is comprised of six Directors, fewer than the nine members allowed by the organization's bylaws. A lack of diversity on its board has restricted it from reaching a wider audience, securing new funding from different sources and providing it with a broader knowledge base in other fields.

HFI is a relatively young organization with a mission of broad appeal. With the public much more aware of the importance of sustainability issues and environmental stewardship, HFI has the opportunity to grow its current programs, attract a wider constituent base and seek new large funders. Private residences, such as Kukio, offer opportunities for HFI to create cultural and environmental fee-based services. Ecotourism is another opportunity. With some of its project sites, HFI could develop hikes and other kinds of education related activities that would be attractive to visitors. HFI is a statewide organization that can have appeal beyond the Hawai'i Islands. By

participating in meetings, conferences and workshops it will also broaden its network. New partnerships and relationships will also help HFI diversify its board, identify new funding sources and develop new programs for the community.

HFI's mission and programs are complementary and/or overlap with other nonprofit environmental organizations, often creating competition for funding. More well-established, well-known organizations such as The Nature Conservancy, Kohala Center, and the National Tropical Botanical Garden have sizable donor databases, large donors and strong national and local networks. In addition, other small conservation organizations such as Nahelehele and Hawaii Conservation Alliance provide similar services and have created additional competition for resources, media attention and funding. With overall donations in the community declining because of economic conditions and the recent Maui fires, HFI faces a challenge of raising adequate funds to grow and enhance its projects and programs. Growing and enhancing partnerships is a way to cooperate rather than compete for funding.

HFI TOMORROW

Vision of the Future

HFI is a recognized and respected voice in economic, social and science-based forestry. It will strengthen its commitment to its core mandate by building upon its current programs and initiating new programs. Hāloa 'Āina Restoration Project, is a larger landscape-scale project that will provide an opportunity to make a bigger impact and generate larger grants and donations. Other projects and programs will be added as opportunities arise. Five new relationships with dynamic and diverse organizations brought together by the board and staff will encourage partnering and raise the profile of HFI and its mission. In addition to forming five new partnerships, HFI's goal is to increase its annual income to \$350,000 over five years to provide adequate administrative funds.

Strategic Issues

During the planning session, the following critical issues were discussed.

1. What is our future focus? What competencies will our stakeholders require in the future?
2. Who will benefit from our mission, products and services? How will we reach them?
3. How will we enhance our reputation and increase our visibility in the community?
4. How will we achieve the funding and resources necessary to achieve our future focus?
5. How will we ensure good governance that includes accountability, transparency, participation and management of the organization?

Strategic Goals

The following goals address the organization's strategic issues and support HFI's mission and vision:

1. Advance the mission of HFI through achieving excellence in its core mandates: forest restoration, educational programs, information dissemination, strategic partnerships and support for scientific research.
2. Establish new relationships and strengthen existing partnerships and collaborative efforts to enhance HFI's contributions and effectiveness.
3. Increase HFI's visibility and reputation by improving public relations and communications.
4. Increase and diversify HFI's funding and resources.
5. Enhance the governance and stewardship of the organization.
6. Raise funds to hire a consultant to lead the organization through a public relations/educational campaign to include identifying campaign partners who have goals that align with HFI's.

PLAN IMPLEMENTATION

GOAL 1: ADVANCE THE MISSION OF HFI THROUGH ACHIEVING EXCELLENCE IN ITS CORE MANDATES: FOREST RESTORATION, EDUCATIONAL PROGRAMS, INFORMATION DISSEMINATION, STRATEGIC PARTNERSHIPS, AND SUPPORT FOR SCIENTIFIC RESEARCH.

Objectives:

1. *Maintain excellence in all current projects and programs.*

Strategy 1: HFI will continue to support and enhance the current, ongoing projects listed below.

- [Ka'ūpūlehu Dryland Forest](#), Hawai'i Island
- [Pana'ewa Zoo Discovery Forest](#), Hawai'i Island
- [Keauhou Bird Conservation Center Discovery Forest](#), Hawai'i Island
- [Hawai'i Papahana Lā'au Kalikimaka, Locally-grown potted Christmas Trees](#), Hawai'i Island
- [Háloa Áina Restoration Project](#), Hawai'i Island
- [Honolulu Zoo Children's Discovery Forest](#), O'ahu
- [Hawaii's Woodshow™, Na Lā'au o Hawai'i](#), O'ahu
- [Hawaii's Woodshow is the Innovation + Imagination \(I+I\) Student Challenge](#), O'ahu
- [Akupu Restoration Project](#), O'ahu
- [Go Native: Growing a Native Hawaiian Urban Forest](#), Statewide
- [Maui Bird Conservation Center Discovery Forest](#), Maui (in exploration phase)

Tactic: Ensure excellence in program delivery, develop timely progress reports to funders, secure ongoing program support through current and new funders, create marketing tools, encourage ongoing and new participation from the community, communicate the success of programs through media, e-mail, website and publications.

Timeframe: On-going.

Responsibility: Board and staff

Strategy 2: Continue the practice of reviewing and evaluating programs and obtaining feedback from program participants.

Tactic: Use methods and tools, such as surveys, to obtain feedback on the effectiveness of programs and for continual evaluation and improvement of all programs.

Timeframe: On-going.

Responsibility: Staff.

2. Explore opportunities relating to the Hāloa ‘Āina Restoration Project.

Strategy: Form a committee to seek strategic partnerships and identify opportunities for this landscape-scale forest restoration site.

Tactics: Identify potential partners and restoration strategy; secure funding; implement and evaluate program, communicate progress to funders and publicize success of program.

Timeframe: Two years.

Responsibility: Hāloa ‘Āina Restoration Project Committee

GOAL 2: ESTABLISH NEW RELATIONSHIPS AND STRENGTHEN EXISTING PARTNERSHIPS TO ENHANCE HFI'S CONTRIBUTIONS, EFFECTIVENESS AND REPUTATION.

Much more can be achieved by approaching issues and concerns through collaborative efforts. As awareness and sensitivity of environmental stewardship and sustainability become a part of our daily lives, it is probable that many other organizations will develop programs similar or related to those produced by HFI. By establishing new relationships and strengthening existing partnerships, HFI has the opportunity to expand its reach beyond its physical location on Hawai'i Island. For example, Ka'ūpūlehu Dryland Forest could be used as a model for developing similar forestry management programs and curricula, which could be shared with other organizations and used as a template for creating new educational material.

Objectives:

1. Maintain and enhance current partnerships.

Strategy: Identify current partners and ensure their continued involvement in programs.

Tactics: Establish methods and tools to regularly communicate with partners.

Timeframe: On-going.

Responsibility: Board and staff.

2. Develop new partnerships with other notable and credible organizations.

Strategy 1: Create five new partners.

Tactics: Identify potential partners and their role, request their support, offer our support, maintain contact and establish formal means of communicating with them.

Timeframe: On-going.

Responsibility: Board and staff.

Strategy 2: Increase HFI participation in important environmental meetings and/or conferences.

Tactic: Identify meetings and conferences, secure funding if necessary for registration and travel, partner with HFIA outreach staff.

Timeframe: On-going.

Responsibility: Board and staff.

GOAL 3: INCREASE HFI'S VISIBILITY AND REPUTATION BY IMPROVING PUBLIC RELATIONS AND COMMUNICATIONS STRATEGIES.

With the advent of the internet, the world has become one global community where information can be accessed instantaneously. Communication now occurs 24 hours and is not dependent upon physical location. A comprehensive public relations campaign will help ensure that HFI becomes more effective in developing its presence in the community, as well as globally. HFI's current methods of communication include a website, social media, email and traditional mail.

Objectives:

1. Improve HFI's ability to enhance public relations and provide community education.

Strategy 1: Seek funding to produce and implement a community education plan.

Tactic: Seek funding. Upon approval of funding, work with PR firm to plan and implement a comprehensive public relations and community education campaign that identifies specific strategies to publicize programs, provide education, and report accomplishments.

Timeframe: Secure funding and produce plan in 2024. Initiate campaign in 2025.

Responsibility: Board, staff and Public Relations firm.

Strategy 2: Create an HFI editorial in major news publications.

Tactic: Identify issues, select publication and appropriate author and submit to publication.

Timeframe: One per year, first editorial in 2024.

Responsibility: Board and staff.

GOAL 4: INCREASE HFI'S FUNDING AND RESOURCES.

In order for HFI to achieve its stated mission, mandate and goals over the next five years, it will need to increase its overall budget. This will entail developing a realistic and achievable fund development plan. Successful implementation of the plan will require a 100% commitment by the board. It will require continuing to build a diversified donor base that should include foundations, governments, business, corporations and individuals through a number of giving strategies. A good balance of restricted and unrestricted funding will ensure long-term stability, as well as opportunities to grow.

Objectives:

1. Produce and implement a fund development plan.

Strategy: Produce a Case for Support in order to increase donations.

Tactic: Edit and update Mahalo ‘Āina Case for Support.

Timeframe: Complete Case for Support June 2024. Implement plan 2024-2028

Responsibility: Fund Development Committee and staff.

2. Require 100 % personal giving by the board to fundraising campaign.

Strategy: Board President to request 100 percent board participation to the fundraising campaign.

Tactic: Board President communicate importance of personal gift to the rest of the board. All Directors support the campaign.

Timeframe: Request to Board by January 2024.

Responsibility: Board, Fund Development Committee and staff.

GOAL 5: ENHANCE THE GOVERNANCE AND STEWARDSHIP OF THE ORGANIZATION.

Good governance requires accountability, transparency and sound management. It ensures the long-term viability and credibility of an organization and is the process by which decisions are made and implemented. HFI's board is comprised primarily of professionals in the field(s) of environmental conservation, forestry and land management, with one Director in the field of law. A strong board requires diversity to encourage new ideas, contacts, resources and expertise. HFI currently has three open board positions and should begin looking for new professionals in fields outside of forestry to fill the slots.

Objectives:

1. Review of bylaws, articles of incorporation and financials on a regular basis.

Strategy: Board to commit to ensuring proper and appropriate oversight of legal and governing documents.

Tactic: Board President to identify board member with governance expertise to review material with the board annually and require staff to maintain current records.

Timeframe: First review by March 2024.

Responsibility: Board and staff.

2. *Maintain a full board of nine members.*

Strategy: Consider creating a Nominations Committee to ensure a full Board.

Tactics: Appoint Nominations Committee Chair, Committee to identify and nominate individual(s) at the board meeting and ensure all board positions are filled.

Timeframe: Create Nominations Committee by June 2024.

Responsibility: Nominations Committee.

3. *Aim for board diversity with professionals who would bring new ideas, resources, contacts and expertise.*

Strategy 1: Ensure at least two of the nine board members represent professions not associated with forestry.

Tactic: Nominations Committee to review board composition, identify potential individual(s), and nominate and recommend for board Director.

Timeframe: Ongoing.

Responsibility: Nominations Committee.

Financial Implications of the Plan

HFI's 2022 annual income was \$213,545, which helps support personnel, general operating expenses (equipment, supplies, insurance, etc.), and program delivery costs. HFI has funding through donations from corporations and individuals, grants from foundations and governments. Personnel costs were kept to a minimum with administrative costs 24%, with the remaining expenses paying for program costs.

Implementing the strategic plan will increase HFI's overall budget. The board is committed to increasing the annual budget to \$350,000 over the next five years. The increase in the budget will allow for adequate human resources to maintain and expand programs, secure and administer grants, provide marketing and publicity support and manage the board and organization. The increased staff hours will help ensure organizational stability and a greater likelihood of achieving the stated goals and objectives of the plan. The goal is to have one permanent full-time staff and one permanent part-time staff in two years. In addition, the increase in funding will be applied to new program delivery costs to support the goal of adding one landscape-scale restoration and education project. Other projects and programs will be added as opportunities arise.

HFI will have a goal of increasing revenue from \$213,545 in 2022 to \$350,000 in 2028. The additional income will allow for flexibility in developing at least one new project, attending conferences and/meetings, creating and

implementing a communications plan and a fund development plan. Funding after the first year will be dependent upon the ability for the organization to execute the development plan, which will identify new sources of funding, strategies and tactics.

Monitoring and Updating the Plan

Monitoring

The board will conduct a formal review and update the strategic plan annually. First review to be conducted in January 2025.

Reporting

Reports for the board will be presented annually outlining the progress toward achieving stated goals of the plan. The board will be kept apprised of the successes and challenges in meeting the organizational mandates and the required funding for the organization. A review of programs will be conducted annually to determine their effectiveness. In addition, the board will review the feasibility of funding ongoing programs and reaffirming or establishing new priorities. New programs will also be considered and evaluated based upon their alignment with the mission and mandates. Funding opportunities and the ability to sustain them will also be taken into consideration in determining their merit.

Modifications to the priorities and adjustments to the timeline will also be based upon the human resources required to successfully implement the plan.