



# Whitebark Pine Ecosystem Foundation of Canada

## 2024 - 2027 Strategic Plan



Source: Kimberley Bulletin

# Whitebark Pine Ecosystem Foundation of Canada

Whitebark Pine is a keystone species, meaning that the biodiversity of the ecosystem is dependent on its survival. Blister rust, an invasive fungal disease, and mountain pine beetle have caused severe infection and mortality rates. Survival of whitebark pine populations hangs in the balance.

## Organizational Overview

WPEFC is devoted to the conservation and stewardship of whitebark and limber pine ecosystems. WPEFC is registered as a non-profit under the Society Act in BC and was registered as a non-profit extra-provincially in AB in 2020. A sister agency to the Whitebark Pine Ecosystem Foundation based in Montana, the Canadian chapter was founded in 2009 by our current President, Randy Moody, and a diverse Board of Directors to serve the unique needs of Canadian members. We maintain strong ties with our U.S. counterpart and both organizations work to conserve and restore these vulnerable ecosystems. We believe:

- Recovery is possible
- Whitebark and limber pine ecosystems are valuable and worth recovering
- Appropriately applied science will aid in this recovery
- Engagement, connection, and communication with partners is necessary

## Governance

WPEFC is governed by a diverse, engaged volunteer board of up to 11 directors, elected for 3 year terms. The board consists of a President, Vice President, Treasurer, Secretary, Membership Coordinator, and members-at-large. Committees address standing and ad hoc issues. An Executive Director liaises with members and the public and oversees much of the day-to-day operations, supported by project and program staff and contractors including project managers, a program manager, and a seed orchard coordinator. WPEFC welcomes new members at any time, and board applicants to run for positions open for election before our Annual General Meetings.

## FOUNDATIONAL ELEMENTS

### Vision:

**Whitebark and Limber Pine ecosystems are self-sustaining through their Canadian Ranges**

### Mission:

**Devoted to the conservation and stewardship of whitebark and limber pine ecosystems through partnerships, science-based active management, restoration, research and education**

**We speak for the trees!**

### Core Values:

WPEFC Core Values help define our conduct and guiding our priorities, goals, objectives and actions:

#### **SUCCESSFUL RECOVERY**

We believe these species can be recovered and we can make a difference

#### **KEYSTONE SPECIES**

Whitebark and limber pine anchor unique ecosystems

#### **ROOTED IN SCIENCE**

WPEFC supports actions that integrate current science and other ways of knowing

#### **PARTNERSHIPS**

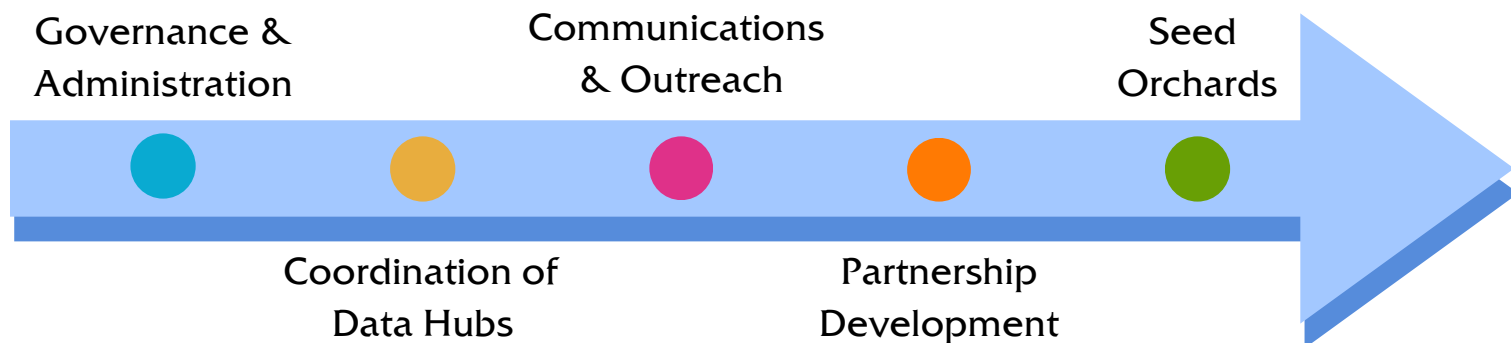
Partners are essential for success in all we do

#### **PEOPLE**

Passionate and engaged people are the key

# STRATEGIC DIRECTION

## Key Goal Focus Areas:



### **Goal 1: Governance & Administration**

Effective governance & capacity to fulfill our mission & mandates

**Strategy 1:** Effective & Diverse Board

**Strategy 2:** Sufficient Staff & Full time Executive Director

**Strategy 3:** Annual Fundraising Strategy

**Strategy 4:** Build Capacity for Contractors

### **Goal 2: Coordination of Data Hubs**

Enable the coordination of whitebark and limber pine knowledge hub

**Strategy 1:** Continue work on Data Hub

**Strategy 2:** Online, user-friendly resource hub

**Strategy 3:** Forum for communicating cone crops

## **Goal 3: Communications & Outreach**

Assess priorities and determine communications strategies within our capacity

**Strategy 1:** Maintain and grow social media presence

**Strategy 2:** Host conference in Kootenays in 2026

**Strategy 3:** Acknowledge donors

**Strategy 4:** Outreach & educational modules

**Strategy 5:** Website updated regularly

## **Goal 4: Partnership Development**

Maintain & foster partnerships that align with our goals

**Strategy 1:** Interagency Recovery & Working Groups

**Strategy 2:** Connect with Volunteers

**Strategy 3:** Work with industry partners

## **Goal 5: Seed Orchards**

Maintain and support disease-resistant seed orchard program

**Strategy 1:** Find sustainable way to support seed orchard

**Strategy 2:** Increase disease resistance

**Strategy 3:** Continued maintenance & growth of seed orchards

## **ACTION PLANS**

For each of WPEFC's goals and strategies, an action plan has been developed to outline the specific tasks, timelines and resources required to implement the strategic plan. The Strategic Plan 2024 - 2027 and Action Plan can be found in our internal files.

## 2024 - ACTION PLANS

|        |                                                                                      |                                                                        |                                                                    |
|--------|--------------------------------------------------------------------------------------|------------------------------------------------------------------------|--------------------------------------------------------------------|
| March  | Better in-kind tracking                                                              | Identify and maintain partnerships in the recovery of these ecosystems | Sustainable ways to support seed orchard                           |
|        | Ensure contract terms are followed                                                   | Improve Seed orchard management, too many meetings                     | Ensure policies and reporting are occurring                        |
|        | Continue work on data hub                                                            |                                                                        |                                                                    |
| April  | Develop and approve annual operating budget (including appropriate contingency fund) | Up to date budget always accessible to board members                   | Prepare website and admin for tech extension training registration |
|        | Data Hub needs assessment                                                            | Assess board capacity to match program requirements for delivery       | Establish an annual fundraising strategy                           |
| May    |                                                                                      | Ensuring all paid hours are tracked and billed to specific projects    |                                                                    |
| June   | Up to date operating budget                                                          | Quarterly reporting on our financials                                  | Technical Extension training days                                  |
|        | Clear maximum expenditures for every staff position                                  | Submission for Gaming Grant ready to go by end of June 2024            | Board meeting Comms agenda items: Video uses fulsome discussion    |
| July   | Funding to hire communications staff (lottery)                                       |                                                                        |                                                                    |
| August | Sufficient staff & FT ED (5)                                                         | ED should have visa or debit card for org purchases                    | Delegate signing authority to project administrators & ED          |

## 2024 - ACTION PLANS

September

Board recruitment  
strategy finalized

ECO Canada Funding  
for a term to manage  
Data Hub work, collate,  
label, reports, etc.

October

Ensuring all paid  
hours are tracked and  
billed to specific  
projects

Focus on  
Mentorship

Data Hub  
infrastructure design  
hardware and software

November

Director mentorship  
program/buddy system

Winter hire for comms

New & current  
directors  
training/onboarding

Develop criteria for working  
with industry partners

Expand our crowd, motorized  
groups and others that may  
not be in our comfort zone

December

Develop better IT  
policies and have  
funding to manage it

6 month check in and  
annual formal  
evaluation for staff (2)

Ongoing list of projects (brief  
workplan/budget) that we can  
provide to funders or students

January  
2025

Capacity for  
communications and  
engagement support

Annual review policies  
and procedures

February  
2025

Schedule and plan  
strategic goals for 2025

## ACTION PLANNING (HOW)

### Governance & Administration

Effective governance & capacity to fulfill our mission & mandates

#### Sufficient staff & FT ED (5)

Shift operational work from volunteer directors to paid staff

Systematic review of projects to identify common job activities between projects to reallocate funds to staff. Shared program activity category.

Transition plan, including hiring, mentorship, and updating job descriptions.

HR committee  
Possible joining by other board members.

Reallocate duplicated resources. Also look for program/ capacity building funding.

Start ASAP. Draft job descriptions ready for May.

#### Develop and approve annual operating budget (include contingency fund)

Up to date working budget with access for all board members

Monthly reviews with program manager & Nick or ED

Don't let the perfect be the enemy of the good.

Project managers & ED & Nick & Finance Committee

Just people.  
Bookkeeper

Start ASAP  
April board meeting to present

#### Ensure all paid hours are tracked and billed to specific projects

Develop common program categories for projects

Request template from other non profits & discuss process

Nick to communicate at monthly review meetings with project manager to ensure we are billing appropriately

Project Managers,  
Nick, ED

Templates & Systems

Before field season.

#### Establish an annual fundraising strategy

Recruit Volunteers to join fundraising committee

Scope out fundraising options

Draft the strategy & communicate to board

Fundraising Committee, ED.

People

Draft for November board meeting

## ACTION PLANNING (HOW)

## Governance &amp; Administration

Effective governance &amp; capacity to fulfill our mission &amp; mandates

## Effective and diverse board

board recruitment strategy targeting specific skill sets

BOD buddy system / mentorship

evaluations and training requirement (e.g. 2hr/yr)

BOD (or recruitment committee)

P&amp;P update, people time

September by election call

## Build comms funding as a part of % each project (or outreach) (ongoing)

Each proposal must include communications funding

Hire Comms person (hours depends on what we can afford)

Project Managers &amp; HR &amp; ED

People time

March 31, 2025

## Comprehensive Policy &amp; Procedure Manual for staff

Periodic staff evaluations (include if they are following manual)

Legal requirements (WCB, labour code, OHS, etc.)

Full time ED, board review

policy &amp; procedures for BOD

After hire ED, before end of 2024 (September for draft)

Pay scale for each position that cannot be exceeded without finance committee approval

## Build Capacity for Contractors

Training &amp; Train the Trainer

Advertising

Survey to find out people's needs &amp; customized training

Experienced, trained individuals

People (time), resource packages, advertising

Post by April, courses June, July, August (annually)

## ACTION PLANNING (HOW)

**Coordination  
of Data Hubs**

Enable the coordination of whitebark and limber pine knowledge hub

**Effective and diverse board**

board recruitment strategy targeting specific skill sets

BOD buddy system / mentorship

evaluations and training requirement (e.g. 2hr/yr)

BOD (or recruitment committee)

P&P update, people time

September by election call

**Communications  
& Media/Outreach**

Assess priorities and determine communications strategies within our capacity

**Utilize available platforms to communicate**

Maintain a social media presence

Maintain user-friendly website aligned with WPEFC programs

Deliver Annual Report & Develop some 1-pagers on different things we're working on for easy share / communication

Communications Committee (coordinating), Communications Manager (doer)

**Funding**

Daily, weekly, quarterly, annually

**Develop Education Strategy**

Choose focus audience(s)

Develop strategy to ID individuals and reach the audience(s)

Make our educational video more accessible

Communications committee and ED

**Funding**

Already started, progress by 2025

**Technical extension**

One-pagers - technical/best practices

Providing information to spark dialogue for the chief forester and FPBC to push the fact that WP is endangered and be part of recovery process

Sharing information of importance of important habitat (status) in BC and AB

Comms committee (coordinating), The experts (Randy, Jodie, etc.)

**Funding**

Start in 2024

## ACTION PLANNING (HOW)

## Partnerships

Maintain & foster partnerships where it aligns with goals

As a hub, coordinate interagency recovery and working groups

Support and coordinate CSWG

Connect with seed orchards and nurseries

Provide information and resources to groups

BOD?

Funding depending on group

Ongoing

Sustained and positive relationships with growers for seedlings for cost certainty

Maintain list of active growers - record and track growers' activities and capacity

Keep BOD informed

Implementers: Jodie, Randy, PCA

People

Ongoing

Develop criteria for working with industry partners

Look at similar organizations policies

Develop draft criteria

Discuss as BOD and make decision

Policy committee

Committee time

Within a year

## Seed Orchard

Maintain and support seed orchard program

Strategy TDB

ACTIVITY TBD

ACTIVITY TBD

ACTIVITY TBD

By Who?

With what resources?

By When?

## MEASUREMENT AND EVALUATION

WPEFC is committed to ongoing and continuous evaluation.

## Our Commitment

Annual review of strategic plan with measurable targets and indicators.

Integrate strategic goals and priorities into board meeting discussions and decision-making.

# Strategic Plan 2024-2027

**Our REASON:** Whitebark Pine is a keystone species, meaning that the biodiversity of the ecosystem is dependent on its survival. Blister rust, an invasive fungal disease, and mountain pine beetle have caused severe infection and mortality rates. Survival of whitebark pine populations hangs in the balance.

**Our VISION:** Whitebark and Limber Pine ecosystems are self-sustaining throughout their Canadian Ranges.

**Our MISSION:** Devoted to the conservation and stewardship of whitebark and limber pine ecosystems through partnerships, science-based active management, restoration, research and education

## Our Core VALUES:



## Our GOALS:

| Governance and Administration                                                                                                                                                                                                | Coordination of Data Hubs                                                                                                                                             | Communication & Outreach                                                                                                                                                                                                                               | Partnerships                                                                                                                                                        | Seed Orchard                                                                                                                                                                                       |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Effective governance & capacity to fulfill our mission & mandates                                                                                                                                                            | Enable the coordination of whitebark and limber pine knowledge hub                                                                                                    | Assess priorities and determine communications strategies within our capacity                                                                                                                                                                          | Maintain & foster partnerships that align with our goals                                                                                                            | Maintain and support seed orchard program                                                                                                                                                          |
| <ul style="list-style-type: none"><li>• Effective &amp; Diverse Board</li><li>• Sufficient Staff &amp; Full time Executive Director</li><li>• Annual Fundraising Strategy</li><li>• Build Capacity for Contractors</li></ul> | <ul style="list-style-type: none"><li>• Continue work on Data Hub</li><li>• Online, user-friendly resource hub</li><li>• Forum for communicating cone crops</li></ul> | <ul style="list-style-type: none"><li>• Maintain and grow social media presence</li><li>• Host conference in Kootenays in 2026</li><li>• Acknowledge donors</li><li>• Outreach &amp; educational modules</li><li>• Website updated regularly</li></ul> | <ul style="list-style-type: none"><li>• Interagency Recovery &amp; Working Groups</li><li>• Connect with Volunteers</li><li>• Work with industry partners</li></ul> | <ul style="list-style-type: none"><li>• Find sustainable way to support seed orchard</li><li>• Increase disease resistance</li><li>• Continued maintenance &amp; growth of seed orchards</li></ul> |