The following strategic plan is a general guide for the major actions of the PA-TACF and a framework of resources needed to complete these actions.

It is recommended that this strategic plan be reviewed and updated every two years by a planning committee and the PA-TACF Executive Board review it each year prior to developing a budget for the following year.

This strategic plan addresses the following major areas:
1. The Mission ........................................... Page 1
2. Research, Breeding, and Science ......................... Page 2
3. Outreach .................................................. Page 8
4. Organizational and Operations Requirements .......... Page 12

In addition, the following pages are included to help summarize the plan
1. Chronological Summary ............................... Page 16
2. Financial Requirements ............................... Page 19

Mission:

The mission of The Pennsylvania Chapter of the American Chestnut Foundation is to restore the American chestnut tree to its native range within the woodlands of eastern North America.

Vision:

The members of the Pennsylvania Chapter of The American Chestnut Foundation seek to develop blight-resistant American chestnut trees, via backcross method of breeding, for the restoration of locally adapted breeding populations of the species to the forests of the mid-Atlantic. This mission will emphasize the participation and coordination of our members at state and local levels.

Our mission will be accomplished working through three broad areas: (1) Research (breeding/science); (2) Outreach (education); and (3) Operations (staff, budget, fundraising)
Goal I: Research, Breeding, Science, and Restoration: Our primary focus since 1994 is to breed, plant, grow, and create blight-resistant American chestnuts that are adaptable to the mid-Atlantic region. Additional areas of research and breeding are undertaken when findings from research help increase the efficiency of current breeding and planting methods and/or further aid long-term establishment and restoration goals.

There are five major objectives within the scientific realm of PA-TACF:

A. Regional breeding program
B. CMS program
C. American tree germplasm conservation
D. Other Research
E. Restoration

To date, PA-TACFs volunteer growers and partners have planted over 50,000 trees and experiences about 50% overall survival of all trees planted (not including direct inoculation and subsequent roguing).

Objective I.A.: Regional Breeding Program:
Since 1994, PA-TACF has participated in TACF’s regional breeding program. The guidelines have been established by the scientific staff of PA-TACF’s parent organization, The American Chestnut Foundation. Through a minimum of five planted generations – through the BC3F2 generation and creation and distribution of the sixth generation – the BC3F3 generation, PA-TACF has sought to create a minimum of 20 unique, Pennsylvania-derived genetic lines within those sources deemed necessary by the scientific leadership of PA-TACF.

- PA-TACF has effectively completed the minimum of 20 lines within two Meadowview sources called Clapper and Graves. We continue to track about 36 Clapper backcross orchards:
  - Trees at 10 orchards have been inoculated.
  - Six Clapper lines have been taken to the BC3F2 stage and are represented at the PSU Arboretum. Backups of those lines are planted with other volunteer growers.
- We continue to track about 14 Graves source backcross orchards:
  - Three Graves orchard has been inoculated.

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1 For a full explanation of the breeding program of The American Chestnut Foundation, please see the article in Volume XIX, Issue 2 of the Journal of The American Chestnut Foundation. On page 55, Dr. Fred Hebard outlines The Backcross Breeding Program of The American Chestnut Foundation. The article is available for download on-line at: http://www.acf.org/journal.htm

2 Here a line is defined as being a cross between a Pennsylvania grown American chestnut tree and an advanced backcross tree (BC3+) derived from TACF’s Meadowview Research Farms breeding efforts.

3 A source is defined as an accumulation of those LINES (see above) having been derived from a single Chinese (or other resistant) parent. The regional breeding program currently calls for breeding only within sources.
• There currently exists no straight Graves BC3F2s derived from the PA-TACF breeding program.
  o Additional sources, Douglas and Nanking, have been moved to the BC2 level. There are five orchard locations where these sources have been planted, but only on a limited scale.

The above accomplishments will be continued and refined with the following strategies:

**Strategy I.A.1:**
- Plant B3F2 seed production orchards within the Clapper and Graves sources
- Inoculate remaining Graves and Clapper lines
- Retain selected BCxs as long as possible
- Committee Recommendation:
  - Sustain current level of maintenance with part-time orchard manager.
  - Increase orchard management to full time extend role with other orchards and improve overall breeding capability, tracking and success.
- Budget Implications: Increasing the orchard management position to full time would require additional dollars. Current State Chapter budget will not sustain this level and additional sources of funding would be required. Refer to the fundraising committee to incorporate this need into their strategies for funding.

**Strategy I.A.2:**
- Continue above sources to seed production orchards as specified by TACF (establishment, production)
- Committee Recommendation: To successfully implement Strategies 1.A.1 and 1.A an improved tree database is need. Full implementation of the database would improve capability to direct resources and track progress of regional breeding across the state.
- Budget Implications: This would be a shared tool that benefits all including national. Funding needs not yet identified.

**Strategy I.A.3:** As new sources are created /identified at TACFs Meadowview research farms, the Board under the advisement of the Science Committee will determine necessity for continuation of lines within other sources.
- Continue small-scale breeding of Nanking and Douglas
- Committee Recommendation: Continue small scale breeding of Nanking and Douglas to increase lines of resistance. Consider
establishing additional orchards with PA and Meadowview materials including B3 Nanking.

- Budget implications: Minor. Covered through routine material request if partnering agency or individual provides overall orchard management.

**Objective I.B: Cytoplasmic Male Sterility (CMS):**

CMS is a PA-TACF led backcross breeding program similar to the regional adaptability backcross breeding program of TACF. CMS employs multiple sources of resistance (MSR) within each backcross while taking advantage of cytoplasmic male sterility (CMS).

The purpose of the program is to introduce multiple Asian resistance sources into locally adapted American chestnuts. The breeding strategy employs CMS to minimize labor and expertise requirements. Because the genetic mechanisms of resistance are not yet known, PA-TACF works to steer the CMS program in various directions as new information is gained from various breeding sources.

The PA-TACF Science Committee believes that PA-TACF has enough resistance sources already included in the CMS program and therefore encourages no new sources to be introduced.

To date, as part of the CMS program, PA-TACF has about 26 F1 orchards and 3 BC1 orchards throughout the region.

**Strategy I.B.1:** Complete original CMS program which maintains maternal lines for progeny testing.

- Science Committee will evaluate status of all CMS orchards by fall 2013.
- Evaluate and consolidate CMS material at the Lancaster County Conservancy (LCC) planting/orchard by Fall 2016, as is feasible.
- Inoculate and select for resistance at LCC Plant harvested BC1F2 seed in a test site with the objective of testing, selecting, and producing BC1F3 product.

**Strategy I.B.2:** Backcross to BC2 stage with regional American pollen⁴, returning seed to pollen source region.

- Continue to use House Rock orchard (B2 seed) to produce pollen.

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⁴ These are the 13 seed zone regions as developed by Penn State University and used by PA DCNR
- Develop method for pollen broadcast and guidelines for how much pollen is required.
- Define where and when to develop CMS material to reach X number of regions by when.
- Determine further options for existing House Rock resource.

**Note:** convene Science Committee to determine ultimate goal and products of CMS Program from a *Chapter perspective*.

**Objective I.C: American Tree Germplasm/Identification:**
This aspect of PA-TACFs research seeks to preserve as much native American chestnut diversity as possible through both *ex situ* and *in situ* conservation practices (though primarily the former). Native stems are lost every year and, with them, possibly novel adaptive complexes. By conserving the germplasm, these complexes can potentially be saved for future use, as necessary.

**Strategy I.C.1:** Capture as much native genetic diversity as possible.
- If new American material is discovered, capture within American Tree Breeding Program and/or CMS program
  - Collect seed from new and established seed sources and plant in native seed orchards
  - Work with communications and outreach team to recruit collectors and processors to prepare seed for storage and shipment. *(Estimated cost of materials (peat moss and storage bags) is $100/year)*
- Explore direct-seeding opportunities with various partners such as the Game Commission (NRCS, DCNR, CBF and Stroud)
- Work with communications team to promote use of American germplasm in developing early successional and edge habitat used by species such as golden winged warbler and Allegheny woodrat
- And to promote planting American chestnut for “backyard wildlife habitat”
- Work with conservation nurseries (ex: PGC) to distribute Am. chestnut seeds and seedlings
- Identify areas most needed for new genetic material (e.g., Northern Tier and western counties.)
  - Tree Locator Forms program
    - Review form for user-friendliness
    - Amend form to ask question as to whether the locator is willing to return to the site to harvest nuts for PA-TACF in the Fall
Objective I.D: Other Research.

**Strategy I.D.1:** Develop cooperatives and partnerships with universities to conduct non-core research and help to distribute data/research findings

**Strategy I.D.2:** Recurrent Selection Timber (RST) Program

The Recurrent Selection Timber Research Program (RST): Beginning in 2004, PA-TACF is conducting an RST research program with the objective of producing blight resistant timber type chestnut trees.

The guidelines have been established, recommended and reviewed by Dr. Robert Leffel, retired USDA Research Agronomist and PA-TACF Scientist. The program is based on the long term successes of agricultural plant breeders producing excellent food crops.

The RST process begins with controlled pollination crosses of Asian by American chestnuts to produce several pedigrees for a first generation (F1) orchard. Isolated seed orchards allow for
natural intercrossing of trees eliminating the difficult process of hand pollination. Additional orchards of F2, F3, F_n are planted as needed to produce resistant timber type chestnut trees. Testing and selection begins with the F2 orchards and beyond. Timber selection will not begin until the trees are at least 12 years old to allow timber evaluation. Resistance testing may begin as soon as the trees are 2” or more in diameter. No backcrossing is required in the F1, F2, F3 stages until a blight resistant timber chestnut tree is produced. Backcrossing to American chestnut trees and/or selection for American traits may be applied in the later years.

- In 2004, PA-TACF produced fifteen unique pedigrees of F1 trees by crossing American chestnuts to Chinese and Japanese chestnut trees in southern York County, PA.
- An orchard of 144 F1 trees were planted at Codorus State Park, Hanover, PA. They were planted in eight replications of random pedigrees and allowed to intercross.
- From the seed produced, an orchard of 600 F2 trees were planted in 2009 at Codorus SP in 37 replications. Additional replacements were added in 2010 and 2011.
- The F1 orchard continues to produce seed and five additional F2 orchards are being planted throughout PA and NJ in 2013.
- The F1 orchard is scheduled for resistance testing in 2013 to determine the resistance of the different pedigrees and determine the best method of testing in F2, F3, etc. generations.
- Timber type selection in the Codorus F2 will be conducted in 2022 or later.
- Additional sources of resistance will be evaluated for the production of more F1 orchards with the possibility of using Long Surviving Americans (LSA), Older Chinese and Japanese trees or Timber type Europeans.

**Strategy I.D.3:** Assist with other research programs that will enable the restoration of the American chestnut.

- Identify/inventory primary questions that PA-TACF would like to have answered but does not have capacity to answer
- Coordinate with TACF and other Chapters to eliminate duplication of effort
- Assist with transgenic programs
- *Phytophthora cinnamomi* research
- Biomass plantings
- Mineland and other reclamation plantings
- Inventory all research going on in state

**Strategy I.D.4:** Ensure that all projects are properly communicated to the outreach committee.
**Objective I.E: Reintroduction and Restoration – silvicultural focus, progeny tests:**

PA-TACF typically partners with other organizations; provides seed and trees for them to be on the forefront of that research. Let the research drive the funding!

**Strategy I.E.1:** Continue to partner with associates in following areas of research where PA-TACF already participates.

- Silviculture – Headed by partnership with PSU. Continue to support research through seed production and coordination with professors
- Evaluate the Chapter Reintroduction Plan on an annual basis
- Develop materials which direct interested growers to the appropriate program for planting
- Centralized testing of 6\(^{th}\) generation material.
- Work with national to develop organization-wide restoration plan.
  - Encourage implementation of a Restoration 2.0 by 2020 campaign
- Track planting and performance of ceremonial and demo Restoration trees

**Goal II: Outreach** (membership, public relations, education); **PA-TACF will encourage the development of each component of outreach in support of our mission.**

There are **three main objectives** within the Outreach goal

- A. Membership
- B. Public Relations and Marketing
- C. Advocacy and Education

**Objective II.A: Membership:** The Chapter will increase membership 5 – 10% annually and maintain a high renewal level in Pennsylvania. We will seek new membership through personal contacts, topically-related fairs and shows (Ag Progress; Farm Show), and other events as they can be supported.

**Strategy II.A.1:** PA Chapter staff will annually determine mission-critical membership statistics.

- Collect and maintain PANJ membership statistics from TACF.
- Develop and implement membership “source code” tracking with TACF membership coordinator
- Document TACF’s renewal cycle, process, and rate of renewal, i.e., “churn rate.”
- Establish communication with underrepresented State Chapters surrounding PA.
- Supplement state membership strategy based on findings.

**Strategy II.A.3:** Review membership benefits.
- Survey current members to determine why they joined and why they renew.
- Assess organizations benefits in relation to attraction and retention.

**Strategy II.A.4:** Contact partners and other environmental organizations to ask for opportunity to print articles in partner newsletter, etc. See strategy ii.C.3 below. *(recommend move to Objective II.B: Public Relations / Marketing)*

**Strategy II.A.5:** Obtain membership email addresses for electronic distribution of info to membership; use address labels, etc.
- Promote use of PA-TACF and TACF listserv.
- Work with TACF to obtain e-mail addresses with initial membership.
- Confirm e-mail addresses in new member welcome e-mail.
- Develop standard sign in sheets to collect emails Special Events.
- Leverage free information through our website in exchange for email address.

**Strategy II.A.6:** Promote Special Events.
- Work with Board to establish Restoration Branch oversight committee; committee responsible for developing strategies to implement events, e.g., solicit chair-persons for events
- Cross promote events through PR/Marketing committee partnerships.
- Obtain attendee contact information.
- Follow-up with attendees.
- Evaluate capacity to make connection with volunteer regional coordinator program.

**Strategy II.A.7:** Recruit and train growers for various membership strategies as above.
- Coordinate with Science and Outreach committees to develop and implement train-the-trainer sessions for volunteer regional orchard managers.
- Promote member participation in harvesting, planting, and pollination.
- Assist Science Committees to create mailing list and database that reaches growers and potential growers for CMS and other programs.
Strategy II.A.8: Facilitate “impulse membership” (e.g., at Farm Show, Ag Progress)
- Train volunteers to help recruit members (and obtain registration fees + donations) at the event.
- Evaluate options with TACF for implementing credit card transactions at Chapter events.
- Develop workshop for the PA-TACF Spring Meeting: member-get-a-member drives.

Strategy II.A.9: Leverage Engagement Touchpoints
- Evaluate PA-TACF online presence.
- Enhance membership engagement through website, online communities, social media, etc.

Objective II.B: Public Relations/Marketing (media, print, electronic)

Strategy II.B.1: Maintain robust web presence, while continually investigating and updating modes of web communication and networking
- Continue to build on Facebook capacities, encourage “liking”, create events, post to wall a few times a week, “like” other relevant organizations
  Stephanie and Susan will remind people at events to like us on facebook. Stephanie will post up to a few times a week and continue to “like” more organizations. Committee will make recommendations and provide support as needed. Included in Admin salary.
- Regularly update Chapter website with events, announcements, stories
  Stephanie will update chapter website on a regular basis. Committee will brainstorm ideas for new posts as needed. Included in Admin salary.
- Explore new avenues for social media
  Committee will review any new ideas at each meeting, at least on a quarterly basis. No costs as of yet.
- Continue to encourage web involvement via list-serv (links to website and Facebook)
  Stephanie, Sara and other contributors will link to website and Facebook as appropriate. Stephanie will add “like us on facebook to e-mail signature. Included in Admin Salary.
- Explore feasibility of LinkedIn as networking tool
  Susan will report to committee feasibility and appropriateness by 12/31/13 meeting. No cost.
Strategy II.B.2: Update stock packet of printed materials
Will review as a committee by 2/1/14.

Strategy II.B.3: Revamp TACF display (see also III.B. Equipment and Infrastructure).
Will review as a committee by 12/30/2014. .... Will research companies for creating new display. ...will research contributors to new design.

Strategy II.B.4: Continue working with TACF Communication staff to ensure comprehensive messaging and marketing strategy.

Strategy II.B.5: Utilize national support for press releases and raising awareness of local events through media

Objective II.C: Advocacy/Education

Strategy II.C.1: To generate increases in membership and donations, determine best audiences (private woodland owners, Penn State PFS’s, hunt clubs, Envirothon network, etc.); events; geographies; and organizations for getting our message out
- Create general brochures for educational centers with orchards on site.
- Seek to speak at ten events annually on AC restoration activities (e.g., Farm Show, PA Forestry Association, PA Environmental Educators, Native Plants in the Landscape, Philly Flower Show, PALTA).
- Figure out give-aways that helps get people more integrated during outreach.

Strategy II.C.2: Inventory past education events in which PA-TACF has participated
- Determine how many and which ones PA-TACF wants to continue.

Strategy II.C.3: Each fall, ask membership to generate list of like-minded groups; contact select list of groups and develop group-specific chestnut article (e.g., Chestnuts for Turkey in NWTF newsletter)
- Also part of Strategy II.A.4 above.

Strategy II.C.4: Position TACF as leader in citizen science for forest restoration strategies.
- Develop and implement Restoration ProStaff (RK Mellon grant to Regional Science Coordinators).
- Identify other “citizen science” thought leaders (e.g., Audubon Christmas bird count, Stroud Water Research Center, Eli Sagor at U. Minn, Shorna Broussard at Cornell, etc.)
- PA-TACF involves itself in more than just the creation of a blight-resistant chestnut tree. The methods it employs are on the cutting edge of conservation, restoration and best silvicultural management practices
- Use this trait as a key to displaying benefits of joining the organization.
- Partner with the Society of American Foresters (SAF) and other such organizations to establish PA-TACF and/or TACF meetings as locales for accrual of continuing education credits.
  - Coordinate with and utilize TACF standards for press-releases and writing
  - This is especially relevant to media relations and Strategy II.C.5 below.

**Strategy II.C.5:** Maintain consistency with TACF’s marketing strategy/messaging.

**Strategy II.C.6:** Coordinate with TACF Education Committee.

**Strategy II.C.7:** Get school groups incorporated into outreach and research opportunities.
  - Win a learning box or a date with PA-TACF at the Farm Show
  - Satisfy STEM needs of new science curriculum of PA State
    - Fit into both science and history curriculum?
  - Get continuing education credits for teachers

**Goal III: Operations** Day-to-day operations are generally handled by the Chapter office (aka “Leffel Center”) located at the Pennsylvania State University, where the goal is to match the operations of the Leffel Center to the objectives of the organization. Staff and much essential equipment (storage, planting, electronic, etc.) are housed by the office. As such, the Leffel Center is to act as a central unit to which members may turn for information, advice, and many other membership benefits.

There are **five main objectives** within the Operations goal of PA-TACF

A. Staff  
B. Equipment and Infrastructure  
C. Board  
D. Fundraising  
E. Budget

**Objective III.A: Staff**

**Strategy III.A.1:** Determine staff needs for next 2-5 years, e.g.,
  - Maintain part-time Chapter administrative support.
  - Maintain Regional Science Coordinator position and maintain 70/30 (national/chapter) funding split through 2013.
  - Volunteer regional coordinators
  - Find funding for at least one summer intern annually.
- Clarify and revise staff position descriptions to reflect Strategic Plan goals and objectives.
- Explore sources of volunteers (VISTA, PCC, AmeriCorps)
- Fundraising – see fundraising section;

**Strategy III.A.2:** Determine training needs and costs for each staff member

**Strategy III.A.3:** Identify data and reporting gaps in communication between staff and board.

- Administrative staff will keep information for the Board of Directors and general membership with regard to and follow-up action items, grant updates, general information, and the ability to forward questions/comments to appropriate individuals/groups.
- Staff and board will identify information and data gaps (e.g., membership information from National; reports from National committees and meetings) and determine best methods for disseminating this information to board and membership.

**Objective III.B: Equipment and Infrastructure**

**Strategy III.B.1:** Computer needs

- As technology advances, the Chapter will have a need to update both hardware and software. Staff will need to keep abreast of necessary equipment
- In addition to staff technology needs, the Chapter should continue upkeep and maintenance of its presentation equipment.

**Strategy III.B.2:** Establish and maintain PA-TACF resource needs/wish list including short and long term capital needs

**Objective III.C: Board**

**Strategy III.C.1:** Determine and clarify relationship between PA-TACF and TACF national board

**Strategy III.C.2:** Continue to revise and refine new committee structure

- These committees will establish and supervise the goals and achievements of each of those sections of PA-TACF organization.
- Reports will be given at PA-TACF Board meetings.
- Develop and distribute calendar of events for board for each upcoming year
- Continue to develop board meeting function
Strategy III.C.3: Consider establishing further partner representation on PA-TACF Board.
  - Identify existing relationships within current board and communicate when an item of interest should be brought to their attention (formal and informal relationships)

Strategy III.C.4: Update the Board Handbook; integrate policies and procedures manual and bylaws
  - Continue to support board with up-to-date information and materials (brochures, press releases, business cards, etc).
  - Incorporate TACF policies and procedures manual into Chapter Board handbook.

Strategy III.C.5: Evaluate other related organizations structures, methods, processes for efficiency and ideas.

Objective III.D: Fundraising

Strategy III.D.1: Identify overall fundraising needs for the PA-TACF chapter.
  - Poll committee chairs for their estimates of funding needs as outlined in (revised) objectives identified in the Strategic Plan.
  - Use this inventory of estimated funding needs for each committee in order to prepare fundraising goals.

Strategy III.D.2: Analyze potential sources of revenue.
  - Examine sources of revenue from the past several years in order to estimate amounts and reliability of these sources going forward.
  - Work with other committees to define projects that are strong candidates for grant applications. Assist in defining requirements and in coordinating support with TACF’s grant writer for specific grant applications. Also explore possibilities for incorporating chapter needs in general grants written by TACF.
  - Learn from those branches whose fundraising activities have been particularly successful and share this information with others around the chapter.
  - Identify and attract high-level individual and organizational donors. Cultivate and develop relationships with these donors to support their retention.

Strategy III.D.3: Coordinate fundraising needs with outreach committees:
  - **Membership:** Assist in setting annual goals in membership growth and identify the means to accomplish these improvements.
- **Public Relations/Marketing** (media, print, electronic): Support efforts to market PA-TACF’s activities and goals to relevant groups. Identify fundraising sources that will improve returns on investment.

- **Advocacy/Education**: Learn where support for TACF’s recovery and restoration work is the greatest and support cultivation of these groups with adequate and appropriate funding.

**Objective III.E: Budget**

**Strategy III.E.1**: Based on advanced draft of strategic plan, establish 2- and 5-year budgets based on content of strategic plan
PA-TACF Strategic Plan (2014 – 2018)
Chronological Summary

YEAR 2014

Goal I Research and Breeding:

Strategy I.A.1:
- Hire PT Orchard Manager for Penn State Orchard

Strategy I.A.2:
- Input PA-TACF tree information into the TACF Tree Database

Strategy I.B.2:
- Convene Science Committee to determine goal of CMS Program

Strategy I.C.1:
- Continue American chestnut seed collection, especially northern tier and western counties
- Train two volunteers for leaf identification
- Amend Tree Locator Form to determine if submitter is willing to harvest the tree in the fall
- Contact Pennsylvania Game Commission about using American chestnuts in their seedling orchard at Howard

Strategy I.E.1:
- Develop materials which direct interested growers to the appropriate program for planting

Goal II: Outreach:

Strategy II.A:
- Increase chapter membership 5-10%
Strategy II.A.1:
   - Develop membership statistics from TACF for chapter new members and churn rate

Strategy II.A.3:
   - Survey members to determine reason joined and reason renewed

Strategy II.A.4:
   - Develop standard sign-in sheet for Special Events to obtain email addresses

Strategy II.B.2:
   - Update stock packet of printed materials

Strategy II.B.3:
   - Revamp chapter display

Strategy II.C.7:
   - Establish High School writing contest at Gettysburg School District to serve as model

Goal III: Operations:

Strategy II.D.2:
   - Examine sources of revenue and assess reliability going forward

YEAR 2015

Goal I Research and Breeding

Strategy I.A.1:
   - Hire FT Orchard Manager for Orchards Statewide
Strategy I.A.3:

- Establish new orchards with Meadowview Nanking B3 material

Strategy I.C.1:

- Train two volunteers for leaf identification

**Goal II Outreach:**

Strategy II.A:

- Increase chapter membership 5-10%

**Goal III: Operations:**

YEARS 2016-2018

**Goal I Research and Breeding**

**Goal II Outreach:**

**Goal III Operations:**
## 2014 Budget
### Revenues

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### Expenses

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