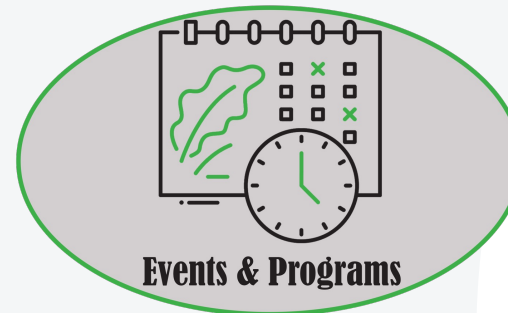




WELCOME

to the IAA Board of Directors!

Part 1 - Orientation





Who we are...

Topics

- ❖ Mission Statement
- ❖ Board of Directors
- ❖ Executive Committee
- ❖ Job Descriptions/Responsibilities
- ❖ Our Tax Status
- ❖ Membership Breakdown





Who we are...

Mission Statement



“

Foster interest, establish standards, exchange professional ideas and pursue scientific research in Arboriculture.

”





Who we are...

Board of Directors



President	Dan O'Brien	Commercial Director 25	Andrew Ranney
President Elect	Eric Hendrickson	Commercial Director 24	Paul Filary
Vice President	Joe Hansen	Municipal Director 25	Michael Collins
Past President	Tony Dati	Municipal Director 24	Theresa Kyriazes
Executive Director	April Toney	Industrial Director 25	Rob Baughman
CoR Liaison 25?	Steve Lane	Utility Director 25	Eric Francke
Treasurer 24	Mark Bluhm	Research Director 25	Michelle Catania
TREE Fund Liaison 24	Mike Priller	Program Director 24	Dr. Fredric Miller





Who we are...

Executive Committee



- 🍂 President – Dan O'Brien
- 🍂 President-Elect – Eric Hendrickson
- 🍂 Vice President – Joe Hansen
- 🍂 Past President – Tony Dati
- 🍂 Executive Director – April Toney
- 🍂 ISA CoR Representative – Steve Lane
- 🍂 Treasurer – Mark Bluhm





Job Descriptions/Responsibilities





President



President's Responsibilities

Duties:

- Schedule and facilitate BOD meetings (4-6 per year) face-to-face or virtual
- Serve on Finance Committee to review and approve annual budgets
- Convene the Executive Committee whenever the necessity therefore arises, or at the request of any members of the committee
- Sign Executive Director's paychecks
- Co-sign checks that are over \$5000





President's Responsibilities

Duties:

- Serve on the Executive Committee
- Serve as ambassador for the association
- Appoint chairpersons to standing and Ad Hoc committees
- Convene a Board of Directors meeting whenever necessary or at the request of any three members of the board
- Facilitate the Executive Director's performance review during the month of April





President's Responsibilities

Duties:

- Moderate the General Session at Annual Conference
- Mentor the President-Elect for progression through the officer track
- Work with the Executive Director to provide direction and oversight
- Attend the ISA Leadership Workshop
- Participate in the creation of the IAA's Strategic Plan
- Submit a written article for each newsletter – 4 total (President's Message)





President Elect



President Elect's Responsibilities

Duties:

- Attend and participate in all BOD meetings (4-6 per year)
- Serve on Finance Committee to review and approve annual budgets
- Participate in the Executive Director's review process and help implement necessary changes
- Moderate the General Session at the Annual Conference
- Participate in the creation of the IAA's Strategic Plan, when applicable





President Elect's Responsibilities

Duties:

- Serve on the Executive Committee
- Attend the ISA Leadership Workshop
- Assist the President in carrying out the mission of the IAA
- Assist the President, and in the event of his/her absence or disability, shall perform his/her regular duties





President Elect's Responsibilities

Duties:

- Responsible for supervising any changes to the chapter constitution and by-laws
- Serve as chairperson of the Donations Committee
- Serve as ambassador for the association





Vice President

Vice President's Responsibilities

Duties

- Attend and participate in all BOD meetings (4-6 per year)
- Serve on Finance Committee to review and approve annual budget
- Participate in the Executive Director's review process and help implement necessary changes
- Participate in the creation of the IAA's Strategic Plan, when applicable
- To serve on the Executive Committee
- To chair the Membership Committee



Vice President's Responsibilities

Duties

- Moderate the General Session during the Annual Conference
- Assist the President and President-Elect in carrying out the mission of the IAA and in the event of the absence or disability of both the President and President-Elect, shall perform his/her duties
- Serve as ambassador for the association





Past President



Past President's Responsibilities



Duties

- Attend and participate in all BOD meetings (4-6 per year)
- To mentor BOD members as needed
- Serve as an ambassador for the association
- To recruit potential candidates for the BOD and committee assignments
- Participate in the Executive Director's review process and help implement changes if necessary



Past President's Responsibilities

Duties

- Serve on Finance Committee to review and approve annual budget
- To serve on the Executive Committee
- To chair the Nominations Committee and fill the ballot need list of nominees by Summer Board Meeting
- Evaluate the strategic plan and monitor for completion of identified milestones
- Participate in the creation of the IAA's Strategic Plan





Commercial Director

Commercial Director Responsibilities

Duties

- To become familiar with the prevailing problems of the commercial arborists in the Chapter area and lend its support to the development of solutions to these problems
- To work with the senior commercial director to help organize and enhance the “Tree Biz Social” events, a quarterly gathering that blends education and social networking for arborists. It involves identifying engaging educational topics, speakers, and suitable locations to make this event a success. The commercial director will leverage their network and creativity to find venues such as breweries or restaurants that provide an inviting atmosphere for learning and networking



Commercial Director Responsibilities

Duties

- To encourage high standards of workmanship and ethics among various commercial interests
- Encourage and recruit commercial arborists to become members of IAA
- To identify relevant speakers and compelling topics for commercial breakout sessions at the Annual Conference & Trade Show
- Assist in obtaining commercial sponsorships for all IAA events
- To work on projects or educational functions designed for commercial arborists



Commercial Director Responsibilities

Duties

- Attend and participate in all BOD meetings (4-6 per year)
- Participate in the creation of the IAA's Strategic Plan
- Moderate the commercial session during the IAA Annual Conference
- Train successor for 2 months after they assume office. Be available after that time for additional questions, as necessary





Industrial Director



Industrial Director Responsibilities

Duties

- Work with local and national vendors that would have interest in developing a supporting relationship with the IAA
- Work with attending and non-attending vendors in donating raffle prizes for the TREE Fund raffle held at the annual conference
- Will assist the Sponsorship Committee in soliciting exhibitors for sponsorship opportunities for the annual and summer conferences, the golf outing and the tree climbing championship





Industrial Director Responsibilities

Duties

- Help with the exhibit hall layout by determining best exhibitor booth locations
- Attend and participate in all BOD meeting (4-6 per year)
- Participate in the creation of the IAA's Strategic Plan
- Train successor for 2 months after they assume office. Be available after that time for additional questions, as necessary





Municipal Director

Municipal Director Responsibilities

Duties

- To become familiar with the prevailing problems encountered in the municipal arboriculture/urban forestry in the Chapter area and lend its support to the development of solutions to these problems
- To help in hosting and facilitating the Northeast or Northwest Municipal Foresters meetings every month except for June, July, August, and November and help secure speakers and locations
- To identify relevant speakers and compelling topics for the municipal breakout sessions at the Annual Conference & Trade Show





Municipal Director Responsibilities



Duties

- Encourage and recruit municipal arborists to become members of IAA
- Attend and participate in all BOD meetings (4-6 per year)
- Participate in the creation of the IAA's Strategic Plan
- Moderate the municipal sessions during the IAA Annual Conference
- Train successor for 2 months after they assume office. Be available after that time for additional questions, as necessary





Program Director

Program Director Responsibilities

Duties

- Attend and participate in all BOD meetings (4-6 per year)
- Submit newsworthy items to IAA office to publish in the newsletter (as directed by deadline) like pre and post conference articles
- Lead the program committee meetings from a developed agenda and hold committee meetings as needed (approximately 2-4 one-hour meetings per year to develop program agendas)
- Develop Annual and Summer Conference programs in conjunction with program committee.





Program Director Responsibilities

Duties

- Identify, contact and schedule speakers and negotiate fees
- Submit committee reports and program agendas at BOD meetings. Summer Conference program should be submitted to BOD for review by February meeting and the Annual Conference program for review by the July meeting
- Recruit program committee members as needed.
- Participate in the creation of the IAA's Strategic Plan



Program Director Responsibilities

Duties

- Serve as liaison/spokesperson for the IAA with external partners (IDNR and other Green Industry Partners) to promote and advance educational programs
- Train successor for at least 2 months after they assume the office. Be available after that time for additional questions, as necessary





Research Director



Research Director Responsibilities

Duties

- To become familiar with the prevailing problems encountered in arboriculture and seek ways to initiate scientific investigations
- To identify relevant speakers and compelling topics for the general sessions at the Annual Conference & Trade Show
- Attend and participate in all BOD meetings (4-6 per year)
- Participate in the creation of the IAA's Strategic Plan, when applicable
- Provide scientific articles for newsletter quarterly





Research Director Responsibilities



Duties

- At least one research project per year would be desired. The chair shall prepare an educational exhibit for the Annual Conference. The project timetable should be presented to the BOD prior to the Annual Conference
- Participate in the creation of the IAA's Strategic Plan
- Train successor for at least 2 months after they assume office. Be available after that time for additional questions, as necessary

Utility Director Responsibilities

Duties

- To become familiar with the prevailing problems of the utility arborists in the Chapter area and lend its support to the development of solutions to these problems
- To identify relevant speakers and compelling topics for the utility breakout sessions at the IAA Annual Conference & Trade Show
- To encourage high standards of workmanship and ethics among various utility interests
- Encourage and recruit utility arborists to become members of IAA





Utility Director Responsibilities



Duties

- Assist in obtaining utility and utility contractor sponsorships
- To work on projects or educational functions designed for utility arborists
- Attend and participate in all BOD meetings (4-6 per year)
- Participate in the creation of the IAA's Strategic Plan
- Provide one article per year for the newsletter.





Utility Director Responsibilities



Duties

- Moderate the utility session during the IAA Annual Conference
- Train successor for 2 months after they assume office. Be available after that time for additional questions, as necessary





Treasurer



Treasurer Responsibilities



Duties

- Attends all Board of Directors' meetings
- Oversees all financial transactions
- Reports financial overview at each meeting, providing in-depth reports upon request
- Provides an annual review and report of the past, fiscal year's financial transaction to include profit & loss, balance sheet and investment portfolio



Treasurer Responsibilities

Duties

- Participates in the Strategic Planning meeting
- Works with the Finance Committee to complete the annual budget to submit to Board of Directors for approval
- Monitor adherence to the budget
- Works with the board to set long-range financial goals along with funding strategies to achieve them
- Serves as the principal liaison between the finance committee and the board





TREE Fund Liaison

TREE Fund Liaison Responsibilities

Duties

- Liaisons “friendraise” for TREE Fund by sharing TREE Fund news and research results with the IAA membership
- Work a TREE Fund booth at the IAA Annual Conference & Trade Show
- Run TREE Fund Raffle and Reception during the IAA Annual Conference & Trade Show, including soliciting raffle prizes from vendors, selling tickets, recognizing donors, pulling raffle tickets and promoting the TREE Fund
- Suggests a raffle prize for and attends the TREE Fund After Hours event





TREE Fund Liaison Responsibilities

Duties

- Encourage members to support the TREE Fund and its activities by connecting with people in their circle of influence
- Train successor for 2 months after they assume office. Be available after that time for additional questions, as necessary
- Participate in TREE Fund meetings and provide the IAA Board of Directors with TREE Fund reports from those meetings
- Participates in the IAA Strategic Planning meeting





CRTI Liaison



CRTI Liaison Responsibilities

Duties

- Serve at the principal liaison between the IAA Board of Directors and CRTI
- Attend CRTI Executive Advisory Council meetings
- Attend IAA Board of Director meetings
- Participate in the IAA Strategic Planning process
- Represent IAA interests at CRTI Executive Advisory Council meetings and vote accordingly





CRTI Liaison Responsibilities



Duties

- Provide IAA Board of Directors with reports from CRTI Executive Advisory Council meetings
- Participate in the CRTI topic driven work groups
- Work on key issues facing trees in the Chicago region
- Work to foster interest, establish standards, exchange professional ideas and pursue scientific research in Arboriculture





IFDC Liaison



Illinois Forestry Development Council (IFDC) Liaison Responsibilities



Duties

- Serve at the principal liaison between the IAA Board of Directors and the IFDC
- Attend IFDC meetings
- Attend IAA Board of Director meetings
- Participate in the IAA Strategic Planning process
- Represent IAA interests at IFDC meetings and vote accordingly





Illinois Forestry Development Council Liaison Responsibilities



Duties

- Provide IAA Board of Directors with reports from IFDC meetings
- Participate in the IFDC Urban and Community Forestry Committee
- Chair the IFDC Urban and Community Forestry Committee as required
- Work to improve the awareness, knowledge around, and quality of urban forestry in the state of Illinois.





Illinois Forestry Development Council Liaison Responsibilities

Duties

- To provide relevant speakers and compelling topics for the IFA breakout session at the IAA Annual Conference & Trade Show
- Work to foster interest, establish standards, exchange professional ideas, and pursue scientific research in Arboriculture





Board Meetings



Board Meetings

Topics

- ❧ Meeting Logistics
- ❧ Meeting Requirements (quorum)
- ❧ What to Expect **Before** the Meeting
- ❧ How the Meeting is Run (Robert's Rules)
- ❧ After the Meeting
- ❧ Electronic Voting





Board Meetings

Meeting Logistics



- 🌿 held every other month
- 🌿 all dates are set by the incoming president
- 🌿 agenda/meeting reminders (3 weeks in advance)
- 🌿 meetings are run by a very relaxed version of (Robert's Rules)





Board Meetings

Meeting Logistics



- ❧ run by relaxed Robert's Rules
- ❧ called to order by the President
- ❧ run by the President
- ❧ President-Elect runs meetings when President is absent





Board Meetings

Quorum Requirements

Quorum – number of members of a group required to be present to transact business legally.



- 🍂 **9** members at a Board Meeting
- 🍂 **25** voting members at an Annual Meeting
- 🍂 **3** members for an Executive Committee Meeting



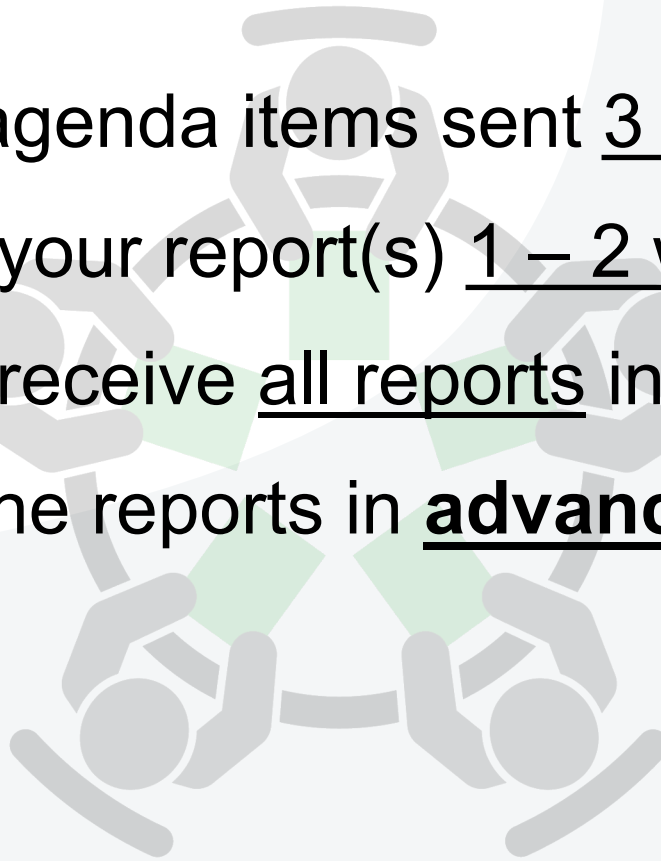


Board Meetings

Before the Meeting



- ❖ call for agenda items sent 3 weeks in advance
- ❖ provide your report(s) 1 – 2 weeks in advance
- ❖ you will receive all reports in advance for review
- ❖ review the reports in advance of the meeting





Board Meetings

During the Meeting



- 🍂 approve minutes from the previous meeting
- 🍂 changes and/or corrections can be made via email
- 🍂 approved minutes are legally binding

APPROVED





Board Meetings

How the meeting is run...



Making a Motion



Motion – making a motion is equal to saying, “I propose that...” or “I think we should...”

- ✿ The person making the motion is assumed to be in favor of it, so is **not** allowed to speak against it. However, the discussion might change one’s mind, so the motion maker may vote for or against it
- ✿ All motions should be made in the affirmative, to avoid confusion from a negative vote on a negative motion.





Board Meetings

How the meeting is run...



Seconding a Motion



- ❖ all ordinary motions must be seconded, to prove that at least two people want the subject discussed
- ❖ if there is no second, the motion **cannot** be considered. The motion then becomes “lost for want of a second.”
- ❖ once the motion is seconded, the President states it or repeats it clearly





Board Meetings

How the meeting is run...



Calling a Vote



When a discussion is finished...

- ❧ a vote is taken
- ❧ all in favor will say “**aye**” and all opposed will say “**no**”
- ❧ after the vote is taken the President will announce the results
- ❧ abstain from voting if there is a conflict of interest!





Board Meetings

How the meeting is run...



Amending a Motion



A motion can be amended in four ways:

- by **striking out** words, sentences, or paragraphs
- by **inserting** – (or adding, if placing at the end) words, sentences, or paragraphs
- by **striking out and inserting words** (with the words inserted replacing the words struck out)
- substituting



Substituting is adding, removing, and/or substituting words in the original motion.





Board Meetings

How the meeting is run...



Amending a Motion (cont.)



Amendment dos and don'ts

- ❖ Must be seconded
- ❖ Requires a majority vote for adoption, even if the main motion requires a different vote for adoption
- ❖ Can be reconsidered





Board Meetings

How the meeting is run...



Amending a Motion (cont.)



- ✿ Only one amendment to amendment can be considered at any one time to avoid confusion.
- ✿ While the amendment is pending, discuss only the point to be amended, not the rest of the motion.
- ✿ When that has been settled, another amendment of the whole motion may be considered.





Board Meetings

How the meeting is run...



Referring to a Committee



Referring to a Committee – A motion made that has the group's general approval, but which must be studied more carefully, and more information is needed before a final decision can be made.

- ❖ If the business is related to a standing committee, it will be turned over to that group.
- ❖ If a special committee should be formed, the motion should state how many members will be on the committee and how they should be appointed.





Board Meetings

How the meeting is run...



Tabling Motions



Tabling Motions – An item of business that should be laid aside temporarily. It is then that we move to table and the motion must be seconded and may not be debated or amended.

- ✿ At any time during the SAME session or during the NEXT session, the motion to take it from the table may be made.
- ✿ If it isn't taken from the table at either of these times, it is considered killed.





Board Meetings

How the meeting is run...



Rescinding a Motion



Rescinding a Motion – When an item of business is repealed or annulled.

- ✿ Any action taken by an organization may be rescinded at any time, provided nothing has been done about it that cannot be undone.
- ✿ The motion to rescind requires a two-thirds vote to pass.





Board Meetings

How the meeting is run...



Committee Work



Committee work should...

- ❧ be done before the board meeting.
- ❧ be presented by the chair with recommendations (not questions)
- ❧ be provided in a written report that the board can review and prepare questions. (Report should contain actions).



The board should give thoughtful consideration to the report; it may adopt, reject or amend the recommendations, or refer them to the committee for further study.





Board Meetings

How the meeting is run...



Executive Session



Executive Session – Executive session is any meeting or part of a meeting in which the proceedings are considered secret, and non-members are excluded (unless they're invited for specific purposes of providing information to the board)

Three Reasons for an Executive Session:

- ❖ employee performance review, discipline, employment contract, or dismissal of an employee
- ❖ buying or selling of public land or key mergers or acquisitions
- ❖ attorney consultation





Board Meetings

How the meeting is run...



Executive Session (cont.)



Executive Session Process:

- ❖ board member make a motion to go into session
- ❖ the motion needs a second (is debatable)
- ❖ it takes a majority vote to adopt
- ❖ all non-members must leave the room until the board votes to end the executive session.



All minutes of the executive session can only be approved in the executive session. Since minutes state actions adopted rather than discussion, only those actions approved in executive session are recorded in those minutes.



Board Meetings

How the meeting is run...



Electronic Votes



- ❧ The state of Illinois allows for e-mail voting. The IAA casts votes via e-mail when issues are time-sensitive.
- ❧ The time frame of the vote is spelled up front. If there is confusion surrounding the vote, we will have a conference call to discuss it.
- ❧ The votes are cast and tallied, and the results are distributed via e-mail.
- ❧ The e-mail votes are re-visited during the next face-to-face board meeting to assure that everyone understood the vote and its consequences.





Board Meetings

How the meeting is run...

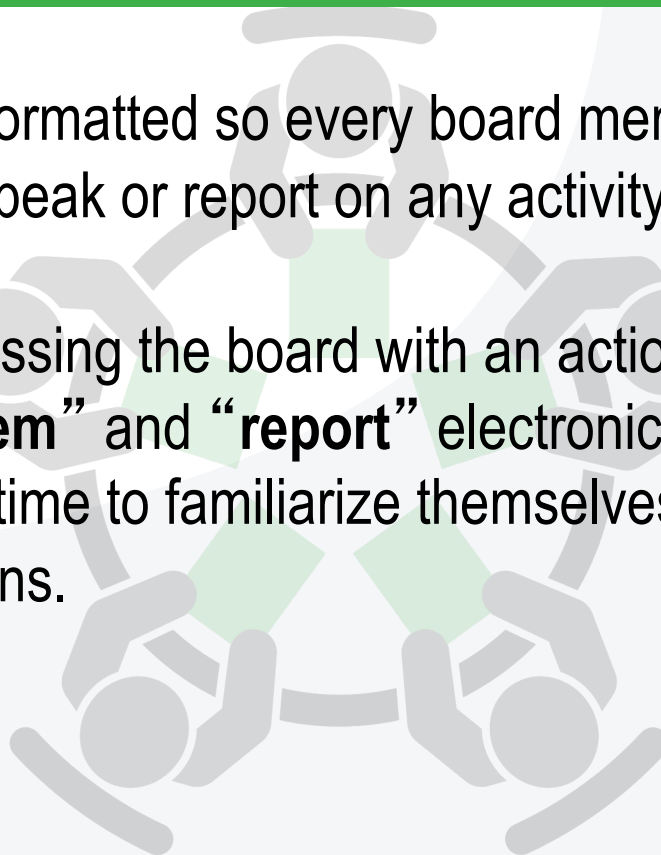


Meeting Agenda



Our agenda is formatted so every board member is given an opportunity to speak or report on any activity.

If you are addressing the board with an action item, please submit your “**action item**” and “**report**” electronically prior to the meeting so others have time to familiarize themselves with the content and prepare questions.





Governance



Governance



The board of directors govern the association by formulating key corporate policies and strategic goals, focusing both on near-term and longer-term challenges and opportunities



If you are a board member, you must make your decisions on behalf of the members, not the staff, today's clients or recipients, or yourself. Morally, even if not legally, you and your board colleagues are agents of the members





Governance

Topics

- 🌿 The Articles of Incorporation
- 🌿 Legal Duties
- 🌿 Avoiding Personal Liability
- 🌿 Whistleblower Policy
- 🌿 Travel Policy
- 🌿 Conflict of Interest Policy





Governance

Articles of Incorporation



The IAA's Articles of Incorporation, bylaws, board-adopted policies and procedures, and a relaxed version of parliamentary procedures govern the operation of the association. A copy of these documents can be found on our website under "**About Us**" – "**Chapter Information**".





Governance

Articles of Incorporation



IAA is incorporated in Illinois and
therefore abides by Illinois Laws.





Governance

Legal Responsibilities



Legal Responsibilities of the Board of Directors



Federal Law



Ensure that the tax-exempt purpose of the chapter is carried out



Protect assets



State Law Fiduciary Duty Requirements



Duty of Care



Duty of Loyalty



Duty of Obedience





Governance

Duty of Care

All association matters must be taken seriously, and you must devote time to the consideration of issues facing the association.

- 🌿 Be familiar with the chapter's finances and activities.
- 🌿 Participate regularly in its governance.
- 🌿 Act in “**good faith.**”
- 🌿 Use the “degree of diligence, care, and skill” that prudent people would use in similar positions and under similar circumstances.





Governance

Duty of Loyalty



You are required to make decisions based on what is best for the association, not what may be advantageous to your company or even to your constituency within the association.



Once the board makes a decision, each director, even those who may have opposed the course of action chosen by the board, must act consistently with that decision.





Governance

Duty of Obligations

This duty requires officers & directors to act in accordance with...

- 🌿 the organization's Articles of Incorporation
- 🌿 bylaws and other governing documents
- 🌿 all applicable laws and regulations





Governance

Avoiding Personal Liability



You will have no personal liability in connection with your service to the IAA board, provided that you act in good faith.

Even if you exercise poor judgment, you are not at risk as long as you do not act recklessly.





Governance

Whistleblower

The IAA has a policy to protect the organization from accounting and/or auditing suspicions.

- 🌿 Whistleblower Policy
- 🌿 Online and in Board Manual
- 🌿 Concerns should be brought to Treasurer
- 🌿 Details can be provided by Steel Accounting Firm (IAA's accounting firm)





Governance

Travel Policy



The IAA recognizes the need to have travel policies for those members of the board who are awarded travel on behalf of the organization.

Directors Authorized for Travel

- ✿ **IAA President:** for ISA Annual Conference, IAA Annual Conference, and the ISA Leadership Workshop
- ✿ **ISA CoR Rep:** for the ISA Liaison Meeting in the spring, the ISA Annual Conference, and Leadership Workshop
- ✿ **IAA Executive Director:** for ISA Annual Conference, the ISA Leadership Workshop, and mileage for all IAA Events





Governance

Travel Policy (cont.)



The IAA recognizes the need to have travel policies for those members of the board who are awarded travel on behalf of the organization.

Others Authorized for Travel



IAA TREE Fund Liaison: for travel to the TREE Fund meetings as well as to the ISA Annual Conference.



IAA Tree Climbing Champions: The 1st place man and woman champion of the IAA Tree Climbing Competition will receive travel reimbursement for 5 night hotel and airfare to the International Tree Climbing Competition.





Governance

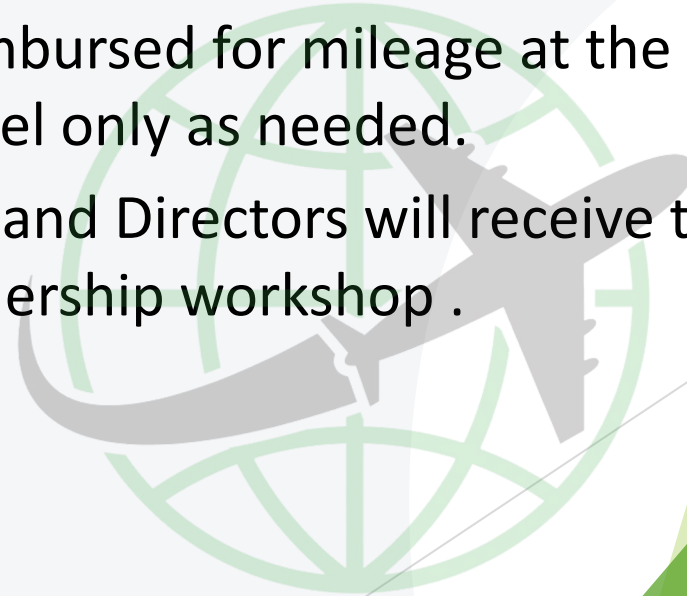
Travel Policy (cont.)



The IAA recognizes the need to have travel policies for those members of the board who are awarded travel on behalf of the organization.

Others Authorized for Travel

- ✿ **Teachers:** Attempt to use local teacher should be made. Otherwise, teachers will be reimbursed for mileage at the IRS mileage rate and for the hotel only as needed.
- ✿ **Officers and Directors:** Officers and Directors will receive travel reimbursement for the ISA Leadership workshop .





Governance

Travel Policy (cont.)

The IAA recognizes the need to have travel policies for those members of the board who are awarded travel on behalf of the organization.

Expense Reimbursement



Transportation at the most economical rate

- 🌰 When air travel is necessary, the lowest coach class fare shall be reimbursed.
- 🌰 Taxis, rental cars, and ride shares should be compact or economy. Personal mileage will be reimbursed at the current IRS rate. Train fare the cheapest rate.
- 🌰 When air travel is cheaper than mileage, take the plane.





Governance

Travel Policy (cont.)



The IAA recognizes the need to have travel policies for those members of the board who are awarded travel on behalf of the organization.

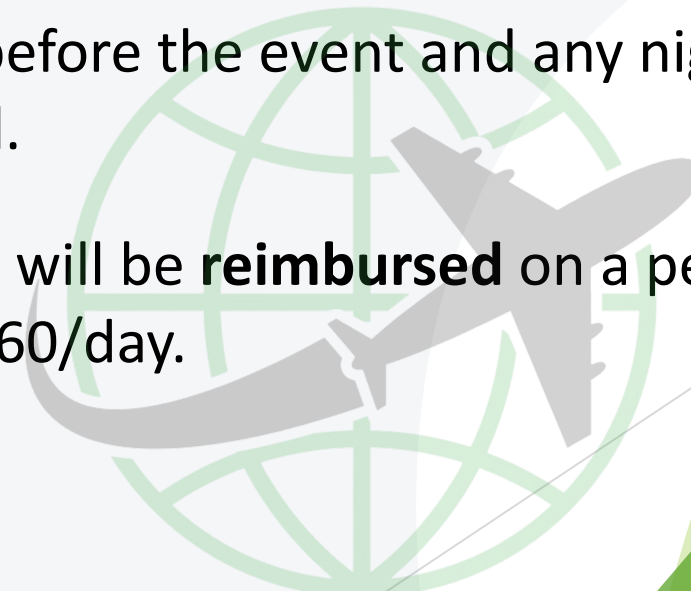
Expense Reimbursement



Lodging - Hotel room conference rates or the lowest reasonable hotel rate in the area; only the night stay before the event and any nights stay during the event will be covered.



Meals - Meals for the individual only will be **reimbursed** on a per diem basis of by day with a maximum of \$60/day.





Governance

Obligations - Attending Meetings

As a Director, you should...



Attend all meetings



Actively participate in discussions and decisions








Governance

Obligations – Be Informed

As a Director, you have a right to...

-  review books and records
-  receive copies of board minutes and financial reports
-  receive notice of all board meetings





Governance

Obligations – Protect Corporate Assets



- ❖ implement an annual budget
- ❖ review annual financial statements with outside auditors
- ❖ define clearly who is authorized to bind the chapter
- ❖ seek legal and financial advice when necessary





Governance

Obligations – Supervise Staff

- ❧ supervise senior-level employees, agents, and consultants
- ❧ require submission of reports from staff and consultants

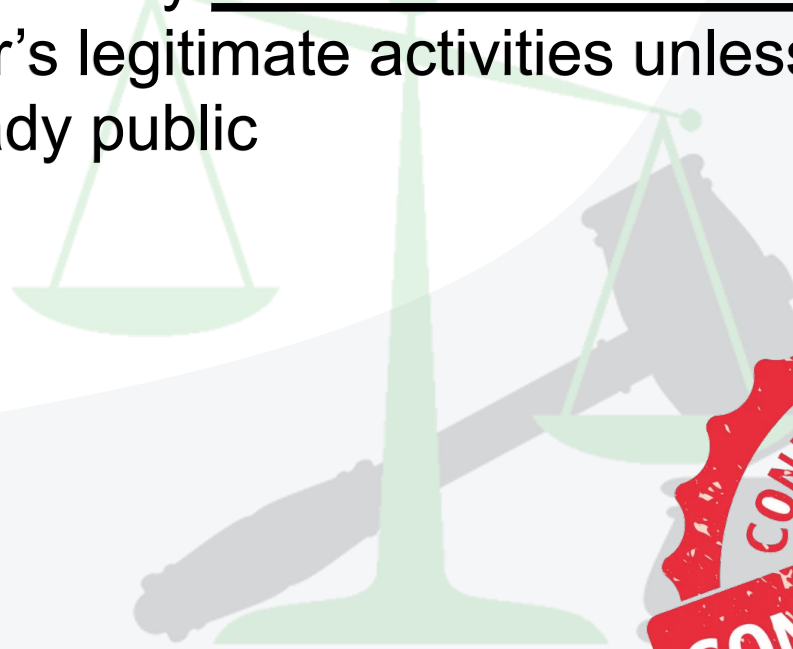




Governance

Obligations – Maintain Confidentiality

Directors may **not disclose information** about the chapter's legitimate activities unless such information is already public





Governance

Obligations – Avoid Conflicts of Interest



A conflict of interest is a situation in which a person or organization is involved in multiple interests, financial or otherwise, one of which could possibly corrupt the motivation or decision-making of that individual or organization.



A conflict may arise when someone with fiduciary responsibility is in a situation where his or her own self-interest might conflict with the organization's interest. For example, when a board member wishes to provide a service to the association, the member's fiduciary duty poses a conflict with his or her sales opportunity.

CONFLICT
OF INTEREST





Governance

Obligations – Avoid Conflicts of Interest (cont.)



The IRS asks exempt organizations to report on Form 990 whether they have a conflict-of-interest policy in place and what the process is for handling a conflict.



Conflict-of-interest policies generally have two basic elements: a requirement that the board or committee member disclose conflicts or potential conflicts, and a prohibition on members voting on any matter in which they have a conflict or potential conflict.

**CONFLICT
OF INTEREST**








Governance

Obligations – Avoid Conflicts of Interest (cont.)



-  Directors must fully disclose all conflicts and not participate in a board vote.
-  All transactions must be fair and reasonable to the organization.
-  All board directors should sign the Conflict of Interest Policy upon taking office.

**CONFLICT
OF INTEREST**





Governance

Executive Director and staff



Committees and volunteers will have their goals/duties spelled out in their strategic goal sheets, as well as the duties that are recognized in the constitution and bylaws.

Staff will manage:

- promoting the events
- processing registrations
- securing insurance
- updating the website
- signing contracts
- paying the bills





Governance

Executive Director and staff



Committees are responsible for:

- Picking the educational topics and speakers (they are in the industry and know the hot topics and demands)
- choosing the event locations (especially for TCC and DOS) locations are picked by the committee and approved by the board
- develop the fee and sponsorship structures – approved by the board
- create policies for the event, i.e., TCC competitor policy for ITCC





Break

Take a 15-Minute Break



Welcome

Know where we have
been so we can decide
where we are going.



What did we do in 2023?



IAA Membership Breakdown

357 – Commercial

343 – Municipal

445 – Not Specified

41– Utility

32 – Green Org



Annual Activities

🌿 Arborist Certification Classes/Exams

🌿 Municipal Specialist

🌿 Utility Specialist

🌿 TRAQ

🌿 Annual Conference

🌿 Summer Conference

🌿 Advanced Training

🌿 Social Climb Event

🌿 MATP and CATP

🌿 NEMF/NWMF

🌿 Tree City USA

🌿 Tree Climbing Comp

🌿 Golf Outing

🌿 Student Field Day

🌿 Day of Service

🌿 Tree Planting Memorial

🌿 TreeBiz Social gatherings



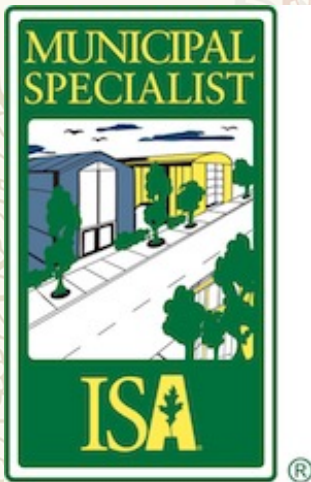
7 Certification Workshops & 2 Municipal Specialist Workshops Completed in 2023

Date	Certification	Location
1/31-3/28	Arborist Certification Classes	Crystal Lake
2/2-4/6	Arborist Certification Classes	Homewood
3/2-5/4	Arborist Certification Classes	Rockford
3/7-4/6	Municipal Specialist Classes	Homewood
8/21-10/30	Arborist Certification Classes	Lombard
2/7-4/11	Virtual Arborist Certification Classes	Virtual
9/7-11/2	Arborist Certification Classes	Homewood
9/19-10/17	Arborist Certification Classes	Winnetka
10/3-11/2	Municipal Specialist Classes	Homewood



23 Exam dates offered in 2023

All Exam dates offer an opportunity for members to take the Arborist Certification, Municipal Specialist, and Utility Specialist Exams



2/21 Zion

3 /4 Bloomington

3/15 Niles

3/25 Bloomington

3/28 Crystal Lake

4/6 Homewood

4/7 Western Springs

4/11 Lombard

4/22 Bloomington

4/25 Crystal Lake

4/26 Zion

5/4 Rockford

5/24 Lombard

6/21 Mundelein

7/26 Zion

8/23 Zion

9/20 Lombard

10/16 Rockford

10/17 Winnetka

10/30 Lombard

11/2 Homewood

11/15 Lombard

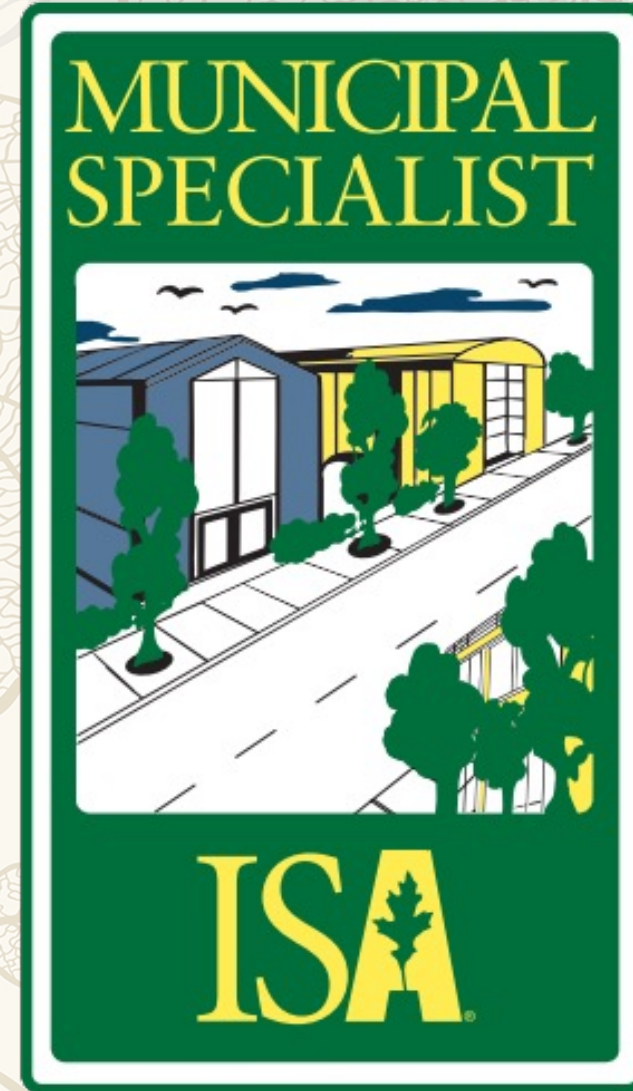
12/14 Lombard



Municipal Specialist Workshops 2023

Classes offered in the
Spring and in the Fall

in-person in Homewood



2023 Certification Fees, Exam Fees, Workshop Income

Certification	
Income	
Recertification and exam fees	\$46,832.00
Workshops	\$20,840.00
GLRI Grant Income	\$1,250.00
Total Income	\$68,922.00
Expenses	
Teachers and Proctors	\$16,511.16
Total Expense	\$16,511.16
Net Income	\$52,411

Certification numbers for Illinois	
Credential	# of holder
BCMA	40
Certified Arborist	1517
Utility Specialist	77
Municipal Specialist	69
CTW Climber Specialist	36
CTW Aerial Lift Specialist	1



Tree Risk Assessment Qualification (TRAQ)

2 Full Training Classes and 2 Renewal

- 🌿 April 25-27, 2023, in Zion
- 🌿 Renewal on April 24, 2023, in Zion
- 🌿 October 25-27, 2023, in Urbana
- 🌿 Renewal on October 24, 2023, in Urbana



TRAQ (Spring & Fall) 2023	
Zion April 24th-27th, 2023	
Urbana October 24th-27th, 2023	
Income	
Registrations	\$18,115.50
Strike Team	\$10,625.00
Total Income	\$28,740.50
Expense	
Food	(\$2,353.49)
Room Rental	(\$400.00)
Instructor fees	(\$6,271.18)
Refunds	(\$1,805.00)
ISA Fees	(\$5,710.00)
Total Expense	(\$16,539.67)
Total Income:	\$28,740.50
Total Expense:	(\$16,539.67)
Net Income:	\$12,200.83



IAA Summer Conference July 12 & 13, 2023

Bloomington-Normal Marriott Hotel &
Conference Center and the ISU
Arboretum

79 Attendees
1 Exhibitor

Field Program at ISU
Arboretum



Summer Conference	
Marriott Bloomington/Normal	
July 12th & 13th, 2023	
Income	
Registrations	\$10,360.00
Sponsors	\$1,915.00
Grant Sponsor	\$3,000.00
Total Income	\$15,275.00
Expense	
Hotel Bill/Deposit	\$11,859.40
Signs	\$105.00
Snacks/ice	\$12.09
Milage	\$225.32
Refunds	\$501.00
Total Expense	\$12,702.81
Total Income:	\$15,275.00
Total Expense:	(\$12,702.81)
Net Income:	\$2,572.19



2023 IAA Hybrid Annual Conference

- 🌿 General Session & Break-out Sessions
- 🌿 3-day Event
- 🌿 Awards were Recognized
- 🌿 New Board Members Announced
- 🌿 Tree Fund Raffle held



Annual Conference 2023	
EVEN Hotel & Tinley Park Convention Center	
November 6-8th, 2023	
Income	
Registrations	\$158,045.00
Exhibitor	\$26,055.00
Grant Sponsorship	\$15,000.00
Sponsors	\$14,630.00
Total Income	\$213,730.00
Expense	
Hotel Bill	\$119,549.00
Speaker fees/ hotel rooms	\$15,011.44
Snacks/Ice/Food	\$710.93
Supplies for Conference	\$55.86
Agendas	\$557.00
Postcards	\$445.00
Name Badges	\$583.21
Padfolios	\$11,321.29
Refunds	\$5,754.00
Awards	\$631.50
Signs	\$385.00
Raffle	\$61.44
Total Expense	\$155,065.67
Total Income:	\$213,730.00
Total Expense:	(\$155,065.67)
Net Income:	\$58,664.33



2023 IAA Hybrid Annual Conference

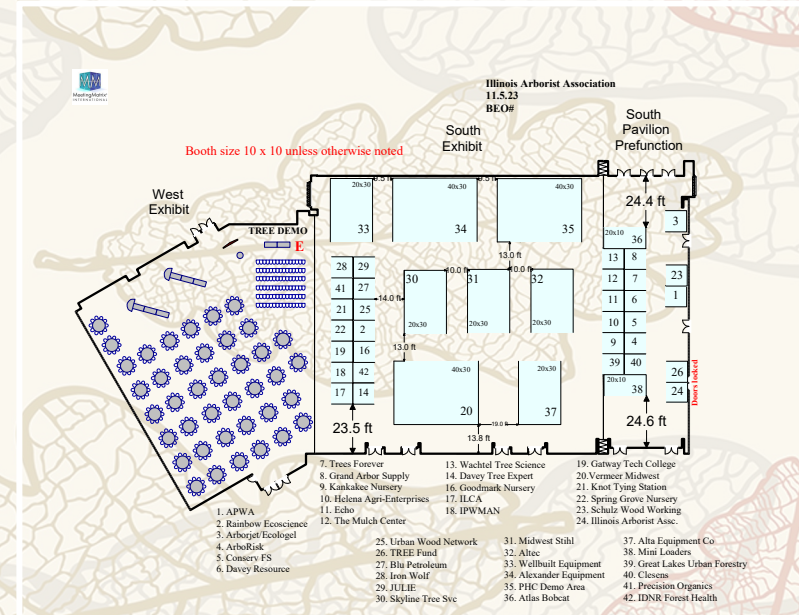


2023 Income: \$213,730
Expense: \$155,066
Net Income: \$58,664

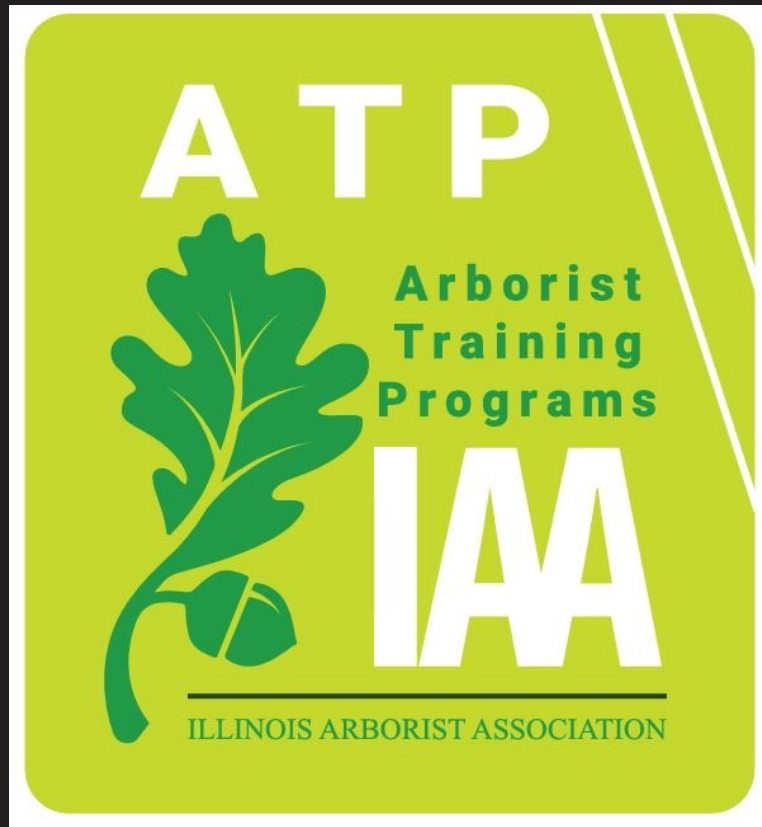


2022 Income: \$188,879
Expense: \$143,275
Net Income: \$45,603

687 – Attendees in person
20 – Virtual attendees
35 – Speakers
42 – Pest Management on Monday
45 – Tree Risk Assessment on Monday
38 – Exhibitors



New Logo for Arborist Training Program Advanced Training Logo to stay the same



2023 Advanced Training Classes

Tree Work Domain

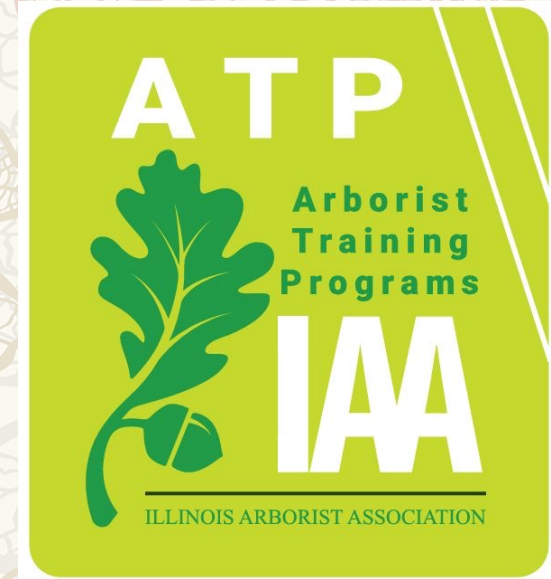
Date	Program	Training	# of Attendees
March 24, 2023	AT	Intro to PHC - Cantigny	15
May 3 & 4	AT	Rigging Level 1 - Lake Forest	6
May 9 & 10	AT	Climbing 1 - Lake Forest	6
May 23 & 24	AT	Climbing Level 1 - Lake Forest	7
May 27, 2023	AT	Species Requirements	19
June 24, 2023	AT	Summer Tree ID - Cantigny	18
July 22, 2023	AT	Abiotics - Cantigny	16
August 15 & 16	AT	Rigging 1 - Lake Zurich	7
September 6 & 7	AT	Rigging 1 - Elk Grove Village	7
September 7, 2023	AT	Insect & Mite Pest - Cantigny	15
September 15 & 16, 2023	AT	Insect & Mite Pest - Homewood	5
September 23, 2023	AT	Tree Diseases- Cantigny	16
October 6 & 7, 2023	AT	Soil & Nutrient Management - Cantigny	13
November 16, 2023	AT	Insect & Mite Pest - Tinley	40
November 16, 2023	AT	Tree Risk Management - Tinley	42
		Total People Trained	106



2023 MATP Classes

Municipal Arborist Training Program

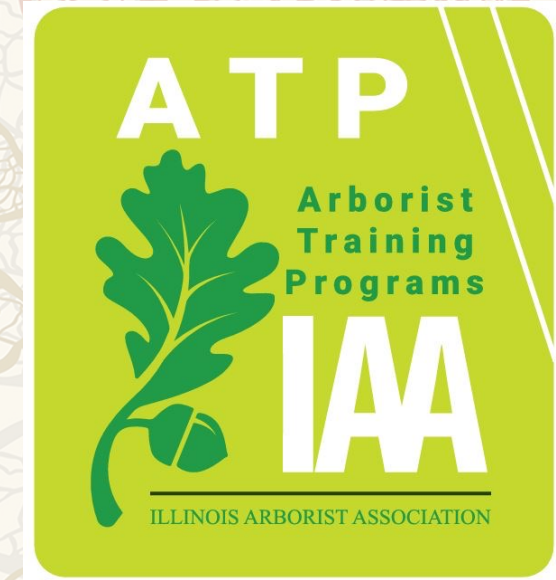
Date	Program	Training	Topic	# of Attendees
April 13 & 14	MATP	Forest Preserves of Cook County	Chipper Safety and Operation - 2 Day	11
April 13 & 14	MATP	Lisle Township	Rigging & Felling	7
April 19, 2024	MATP	Forest Preserves of Cook County	Aerial Lift Safety	9
April 21, 2024	MATP	Forest Preserves of Cook County	Chainsaw Safety and Operation	8
April 25, 2024	MATP	Pingree Grove Public Works	Chainsaw Safety and Operation & Pruning	10
April 26, 2024	MATP	Starved Rock - IDNR	Aerial Lift Safety	9
April 20, 2024	MATP	Forest Preserves of Cook County	Aerial Lift Safety - Group 2	9
May 10, 2023	MATP	Chainsaw Safety & Ops/Chipper Safety & Ops	Sugar Grove Public Works	10
May 17& 18	MATP	Pruning and Chainsaw & Felling	Round Lake Public Works	9
May 30, 2023	MATP	Chainsaw Maintenance	Village of Bartlett	10
May 31, 2023	MATP	Aerial Lift Safety Training	Village of Arlington Heights	21
June 7, 2023	MATP	Chainsaw Safety and Felling	Village of Evergreen Park	11
June 21 & 22	MATP	Aerial Lift Safety and Aerial Rescue	City of Evanston	25
June 27 & 27	MATP	Aerial Lift Safety	Ela Township	26
July 18, 2023	MATP	Aerial Lift Op & Safety	Village of Carpentersville	5
September 21, 2024	MATP	Chainsaw and Chipper Training	Village of Niles	10
September 27, 2024	MATP	City of Bloomington	City of Bloomington	7
October 2, 2023	MATP	Chainsaw and Felling	Grundy County Highway Dept	7
October 3, 2023	MATP	Entry Level Climbing	Village of Vernon Hills	6
October 16, 2023	MATP	Aerial Lift Safety	Grundy County Highway Dept	7
October 30, 2023	MATP	Aerial Lift Training	Village of Mount Prospect	10
November 3, 2023	MATP			
November 3, 2023	MATP	Chainsaw Safety & Ops/Chipper Safety & Ops and Pruning	LaGrange Community Park District	6
			Total People Trained	233



2023 CATP Classes

Commercial Arborist Training Program

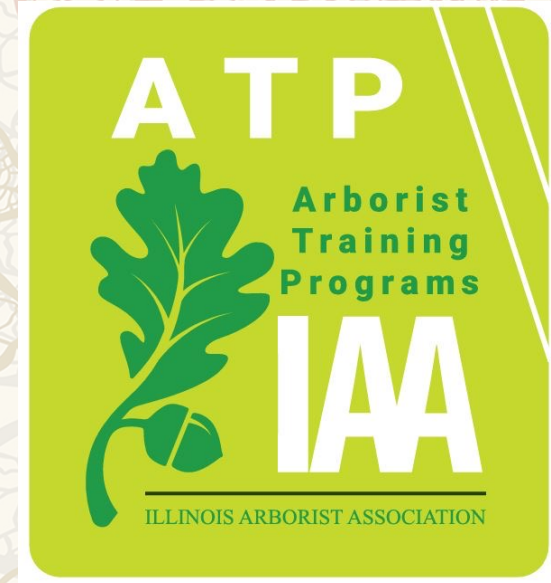
Date	Program	Training	Topic	# of Attendees
January 20, 2023	CATP	Semper Fi	Chainsaw Maintenance	13
April 18, 2023	CATP	Gardeneers	Chainsaw Safety & Felling	10
June 5 & 6	CATP	Beginning Climbing	Openlands	10
August 25, 2023	CATP	Aerial Rescue Rope and Harness	Homer Tree Care Co.	22
				55



2023 CHOT Classes

Community Hands-on Training

Date	Program	Training	Topic	# of Attendees
July 12, 2023	CHOT	Chainsaw Safety and Pruning at Heartland Conservancy	General - Heartland Conservancy in Collinsville	20
August 18, 2024	CHOT	Felling and Chipper Safety and Ops	General -City of Bloomington	29
August 23, 2023	CHOT	Chainsaw Maintenance & Felling at Douglas-Hart Nature Center	General - Douglas Hart Nature Center in Mattoon	12
			Total People Trained	61





NO CTW was ran in 2023.

We need proctors!

2022 Certified Tree
The Mulch Ce
Instructor; Nor



2023 Spanish Tree Worker

Feb 18th Rigging

March 11th Felling and Rigging

March 25th Climbing

April 8th Aerial Rescue

The Mulch Center

Teachers: Eduardo Medina & Felipe Cornejo

18 attendees

Classes taught in Spanish



2023 NEMF Meetings

NEMF Meetings 2023			
Date	Topic	Attendees	Showed
19-Jan	The Chicago Region Carbon Program (CRCP)	71	44
16-Feb	Society of Municipal Arborists	99	69
16-Mar	Abiotic Impacts – Lead Water Service Replacement Awareness	62	33
20-Apr	Illinois Pest/Disease Update	72	33
18-May	The Carrot & the Stick – Persuading Tree Plantings on Private Property	40	32
26-Sep	New Advancements: Using Smart Tree Inventories	48	39
16-Nov	SGN Tour	44	24
21-Dec	21st Century Ordinance Builder	38	17
		474	291
Total Registered Attendees: 474			
Total Showed: 291			



2023 NWMF Meetings (Moline)

NWMF Meetings 2023			
Date	Topic	Speaker	Location
27-Apr	Update on Pest and Diseases of Trees	Dr. Miller	Moline Public Works
29-Jun	Chainsaw Maintenance and Sharpening	Norm Hall	Moline Public Works
Total Attendees:			



2023 Tree Biz Socials

TreeBiz Socials 2023			
Date	Topic	Location	Attendees
1-Mar	Starting PHC Services in Your Business	Noon Whistle Lombard, IL	23
17-May	A Safer, Better Fuel Solution	Skeleton Key Brewery, Woodridge	21
30-Aug	The Gateway to Tree Science	The Morton Arboretum	28
6-Dec	Wisconsin Arborist Apprenticeship Program	Half Day Brewing Company, Lincolnshire	19
Total Attendees: 91			



2023 Tree Biz Socials

TreeBiz Social Budget	
Income	
Income	\$1,700.00
Total Income	\$1,700.00
Expense	
Food and Beer	\$707.40
Total Expense:	-\$707.40
Total Income:	\$1,700.00
Net Income:	\$993.00



IAA Golf Outing

Bonnie Brook Golf Course
August 11, 2023

- 🌿 73 golfers
- 🌿 3 Beer Cart Sponsors
- 🌿 6 Hole Sponsor's
- 🌿 2 Lunch Sponsors
- 🌿 1 – Hole-in-One Sponsor



IAA Golf Outing

Bonnie Brook Golf Course

August 11, 2023

Golf Outing 2023	
Bonnie Brook Golf Course	
August 11th, 2023	
Income	
Registrations	\$6,940.00
Sponsors	\$4,390.00
Total Income	\$11,330.00
Expense	
National Hole in One Insurance	\$397.95
Venue	\$360.00
Raffle Prizes	\$295.65
Food/Drinks	\$8,404.91
Signs	\$153.00
Total Expense	\$9,611.51
Total Income:	\$11,330.00
Total Expense:	\$9,611.51
Net Income:	\$1,718.49



Illinois Tree Climbing Championship

Salt Creek Forest Preserve

- ✿ 23 competitors
- ✿ 2nd Annual Arbor Fair – 7 companies signed up
- ✿ Libby Bower represented IAA in Albuquerque!
- ✿ Libby Bower and Beau Nagan took 1st place.
- ✿ Ryan Sams and Logan Stine took 2nd and 3rd place
- ✿ Davey Tree Experts won the ComEd Corporate Cup



TCC 2023	
May 20th & 21st	
Salt Creek Forest Preserve – 18W200 Elizabeth Dr, Wood Dale, IL 60191	
Income	
Registrations	\$1,840.00
Corporate Cup Award Registrations	\$900.00
Arbor Fair	\$75.00
Sponsors	\$3,500.00
Coloring Book	\$5.00
Total Income	\$6,320.00
Expense	
Gear	(\$2,148.28)
Signs	(\$280.00)
Awards/Plaques/Gifts	(\$1,479.75)
Set Up/Supplies	(\$2,573.05)
Shirts (Competitors, Judges, Volunteers)	(\$996.29)
3 Day Permit Fee	(\$135.00)
Total Expense	(\$7,612.37)
Total Income:	\$6,320.00
Total Expense:	(\$7,612.37)
Net Income:	(\$1,292.37)
Purchased equipment and steal stakes for events	





Student Forestry Field Days

Touch of Nature

May 23-25, 2023

2 1/2 Days filled with training, collaboration, and interaction with students.

Training covered:

- 🌿 Chainsaw Safety and Operation, PPE, Parts, Maintenance
- 🌿 Field Application – log bucking and felling operations
- 🌿 Invasive Plants and Pests ID and Management & field application
- 🌿 Tree Climbing Techniques
- 🌿 Chipper Safety & Operation

Career Fair





Student Forestry Field Days

Touch of Nature

May 23-25, 2023

SIU Student Field Day at Dixon Springs and the Touch of Nature	
Income	
Sponsors	\$3,125
Expense	
Insurance	\$265
Hats	\$610
Touch of Nature	\$4,883
Signs	\$216
Refund for Davey	\$925
Refund of SavATree	\$75
Total Expense	\$6974
Income	\$3,525
Expense	-\$3449





Student Arboriculture Demonstration Event

September 14 & 15, 2023

Careers in Arboriculture Demo Event	
September 14 & 15, 2023	
The Morton Arboretum and The Double Tree Hotel in Lisle	
Income	
Attendee Fees	\$1,000.00
Sponsorship and Career Booths	\$3,875.00
IAA Budget	\$3,500.00
	\$8,375.00
Expenses	
Hotel Rooms/Banquet Hall/Dinner	\$6,487.52
Lunches	\$1,837.85
Signs	\$60.00
Bags	\$184.39
Insurance	\$265.00
Breakfast	\$119.78
WGN Promotion	\$69.99
	\$9,024.53
Total Income	\$8,375.00
Total Expense	-\$9,025.00
Net Expense	-\$650.00



2023 Day of Service

Camp Fire
Bolingbrook, IL

19 Volunteers completed work at
Camp Fire

Calculated final work estimated at
\$18,000

Participants: provided Chip Trucks and chippers, Tracked/wheeled Lift Unit, Chainsaws, Pole Saws, Combo Truck, Mini Skid Steer with grapple attachment, stump grinder, Vermeer mini skid, chipper #2, front end loader with winch, skid steer and forestry cutter, power pole saws.



2023 Tree Planting Memorial

The 2023 Tree Planting Memorial was held on October 21st at Rotary Park in Springfield, IL. Greenview Company donates the Trees for the IAA Memorial service.

Aaron Schulz is the Chair of this committee.

Trees were planted for:
Norma Lager – Black Tupelo
Larry Hall – White Oak





2022 ISA MEMBERSHIP NEEDS SURVEY RESULTS

ISA Needs Assessment Survey Results

Being affiliated with a professional association that serves the arboriculture industry and promotes greater awareness of the benefits of trees is **the top driver of membership in ISA.**

ISA Needs Assessment Survey Results

Respondents in 2022 are **most challenged with**

- Hiring qualified staff and managing workforce turnover (35%)
- Finding time to focus on professional development (32%)
- Dealing with public misperceptions of their work and the arboriculture industry (31%).

ISA Needs Assessment Survey Results

The **top challenge for respondents in 2022** is hiring qualified staff and managing workforce turnover. The top challenge for respondents in 2017 was finding time to focus on professional development, and the top challenge for respondents in 2012 was educating potential clients about the need for professional tree care.

	2012	2017	2022
Hiring qualified staff and managing workforce turnover	23%	25%	35%
Finding time to focus on professional development (credential maintenance, CEUs, etc.)	37%	42%	32%
Dealing with public misperceptions of my work and the arboriculture industry	N/A	N/A	31%
Educating potential clients about the need for professional tree care	49%	38%	26%
Competitive pressure from unethical and/or unqualified companies in my area	28%	25%	22%
Keeping up with the latest technology and innovation in the arboriculture industry***	25%	23%	17%
Dealing with the impacts of climate change	N/A	N/A	16%
Identifying how to be competitive but still run a profitable and successful business	N/A	14%	14%
Planning for leadership changes within my organization that will happen in the coming years (succession planning)	14%	17%	13%
Keeping up with the rules and regulations impacting the arboriculture industry	N/A	N/A	13%
Physical limitations created through work in arboriculture (chronic and acute injuries)	12%	10%	11%

ISA Needs Assessment Survey Results

Respondents **are most in need of**

- Salary information for benchmarking against peers in the industry (28%)
- Information on new techniques and approaches in the arboriculture industry (28%)
- Easy access to educational and professional development resources (43%)
- The value of membership compared to cost (33%), and the relevance of ISA content and resources to their careers (32%) are the top areas that, if improved, would make individuals more likely to recommend membership in ISA. Please note, “membership” may be viewed as ISA membership, component membership, or a combination of both.



ISA Needs Assessment Survey Results

To increase the value of membership, members would like to see ISA provide more online learning opportunities and resources (48%) and increase the impact or visibility of its advocacy efforts that promote the importance of professional arborists to consumers (38%).

ISA Needs Assessment Survey Results

Two-thirds of respondents think it is very important for ISA to focus on promoting the value of proper tree care to consumers.

ISA Needs Assessment Survey Results

In general, not exclusive to ISA, what are your preferred methods for receiving news, updates, and other information regarding the arboriculture industry? (Select all that apply)

	Percent
Email	75%
Websites	45%
E-newsletter	34%
Publication	34%
Mail	26%
Social media	23%
Podcast	15%
Text/SMS message	10%
TV/Cable	3%
Telephone	2%
Other, please specify:	2%
None of the above	2%
n = 7980	

ISA Needs Assessment Survey Results

For you personally, what are the primary reasons for pursuing an ISA credential?

	2012	2017	2022
Expand my professional knowledge	74%	77%	77%
Demonstrate my knowledge/qualifications to others in the industry	66%	62%	58%
Personal pride in earning the credential	63%	66%	58%
Establish myself in the industry	60%	52%	48%
Stay on par with other professionals	45%	48%	46%
Gain a competitive edge over other professionals	43%	48%	45%
Obtain a promotion and/or raise	18%	22%	25%
My employer or a bid contract required it	21%	26%	20%
Other, please specify:	5%	4%	4%
n =	4222	4708	6961

ISA Needs Assessment Survey Results

What could ISA add or change that would increase the value of membership for you? (Select up to five)

	Percent
Provide more online learning opportunities and resources	48%
Increase the impact or visibility of ISA's advocacy efforts that promote the importance of professional arborists to consumers	38%
Provide more virtual events/meetings	25%
Increase outreach and engagement in global initiatives that promote the benefits of trees to communities	25%
Provide more in-person events/meetings	24%
Provide more support and access to research	24%
Provide more opportunities to be involved in advocacy efforts that promote the importance of professional arborists to consumers	23%
Support diversity, equity, and inclusion in the arboriculture industry and workforce	16%
Provide more opportunities to engage with peers in a digital global community	13%
Base membership dues on scalable amounts dependent on global economic ratings	11%
Provide more resources in languages other than English	9%
Other, please specify:	9%
Nothing would increase the value of membership	7%
n = 4834	

ISA Needs Assessment Survey Results

What is the primary reason(s) you are not a member of ISA? (Select all that apply)

	2012	2017	2022
My employer will not pay for or reimburse membership dues	N/A	N/A	23%
I do not believe there are enough relevant benefits to justify the cost	N/A	33%	21%
I am unaware of the value and benefits of belonging to ISA	15%	23%	15%
I have never been asked to join/rejoin	9%	17%	13%
I am new to the industry	N/A	N/A	10%
I forgot to renew my membership	11%	N/A	9%

ISA Needs Assessment Survey Results

Continued

	2012	2017	2022
I am active in another association that better meets my professional needs – please specify the association:	N/A	8%	7%
I am retired	2%	1%	6%
I am only a member of an ISA chapter, associate organization, or professional affiliate (SMA, UAA, SCA or AREA)	N/A	N/A	5%
I am no longer in the industry	3%	1%	4%
My previous experience with ISA was unsatisfactory	N/A	N/A	4%
I am able to receive other educational offerings locally – please specify:	N/A	9%	2%
ISA does not represent my interests	N/A	N/A	2%
I am new to the profession	14%	N/A	N/A
I am unaware of any events offered locally	11%	N/A	N/A
I am active in another association with overlap value	10%	N/A	N/A
Other, please specify:**	28%	27%	16%
I do not believe there is enough value to justify the cost	29%	N/A	N/A
None of the above	N/A	N/A	9%
n =	2425	1074	3474

ISA Needs Assessment Survey Results

What could the component do to increase the value of membership?

	Georgia Arborist Association (GAA)	Hong Kong Chapter	Illinois Chapter (U.S.)	Indiana Chapter (U.S.)
Improve content/speakers at programs	14%	16%	15%	17%
Better communication	7%*	25%	12%	9%
More volunteer opportunities	11%	14%	10%	13%
More opportunities to earn CEUs	30%	51%	35%	39%
More opportunities for certification preparation and training	23%	33%	21%	25%
More research and development	9%	27%	10%	14%
More local events	25%	44%	33%	36%
Deeper discounts	11%	31%	18%	9%
Better event locations	5%*	13%	20%	13%
Better customer service	7%*	11%	6%	6%
Offer programs on specialized topics, please specify:	4%*	5%	9%	8%
Other, please specify:	4%*	4%	6%	6%
Nothing could increase the value of membership	29%*	7%	22%	22%
n =	56	131	199	77

ISA Needs Assessment Survey Results

Issues and challenges being faced vary significantly based on respondents' area of practice.

Q6: What are the primary issues and challenges you currently face in your career? (Select up to five)	Commercial/ Residential Tree Work	Urban Forestry	Public Works/ Government	Landscaping/ Nursery	Municipal Forestry	Utility/ Vegetation Management	NET
Hiring qualified staff and managing workforce turnover	42% ↑	34%	34%	40% ↑	38% ↑	40% ↑	35%
Finding time to focus on professional development (credential maintenance, CEUs, etc.)	32%	33%	35% ↑	34%	33%	35% ↑	32%
Dealing with public misperceptions of my work and the arboriculture industry	26% ↓	38% ↑	40% ↑	26% ↓	44% ↑	40% ↑	31%
Educating potential clients about the need for professional tree care	30% ↑	31% ↑	25%	34% ↑	25%	21% ↓	26%
Competitive pressure from unethical and/or unqualified companies in my area	33% ↑	24% ↑	17% ↓	25% ↑	19%	21%	22%
Keeping up with the latest technology and innovation in the arboriculture industry	14% ↓	19% ↑	19% ↑	19% ↑	18%	17%	17%
Dealing with the impacts of climate change	11% ↓	23% ↑	22% ↑	17%	27% ↑	15%	17%
Identifying how to be competitive but still run a profitable and successful business	23% ↑	14%	7% ↓	23% ↑	7% ↓	10% ↓	14%
Planning for leadership changes within my organization that will happen in the coming years (succession planning)	13%	14%	17% ↑	15%	17% ↑	14%	13%
Keeping up with the rules and regulations impacting the arboriculture industry	12%	13%	15% ↑	13%	13%	18% ↑	13%

ISA Needs Assessment Survey Results

Issues and challenges being faced vary significantly based on respondents' area of practice.

Q6: What are the primary issues and challenges you currently face in your career? (Select up to five)	Commercial/ Residential Tree Work	Urban Forestry	Public Works/ Government	Landscaping/ Nursery	Municipal Forestry	Utility/ Vegetation Management	NET
Physical limitations created through work in arboriculture (chronic and acute injuries)	16% ↑	12%	10%	11%	12%	9% ↓	11%
Dealing with the increased demand for professional arboriculture	13% ↑	14% ↑	12%	10%	14% ↑	11%	11%
Managing technical and scientific information to avoid overload	7% ↓	13% ↑	14% ↑	9%	13% ↑	8% ↓	10%
Marketing and outreach to potential clients	13% ↑	10%	4% ↓	12% ↑	6% ↓	6% ↓	9%