

More Fully Understanding Your Interest in PLT

1. Vision and Commitment to the long term success of PLT

Context: PLT is a leading national environmental education organization in business for over 40 years.

Questions:

- a. What is your vision for the future of PLT and how can your organization help it realize that vision?
- b. What synergies do you see from PLT becoming a part of your organization?
- c. How long will you legally commit to continuing PLT at its present level of effort?

2. Staff and the institutional knowledge that staff brings

Context: PLT currently has 8 fulltime professional staff. Our staff salary and benefits budget for 2017 is \$1m, including allocated costs from the Executive office and other places. We also receive support for accounting, finances, development, human resources, data base management, and information technology. In addition, we rely on consulting services to support the work of the staff, from meeting planning to curriculum development to research and evaluation, to web management and digital marketing.

Questions:

- a. Provide a list of your employees and their job responsibilities.
- b. Provide your salary and benefits budget total amount budgeted for 2017.
- c. Provide your benefits package that you provide to employees for 2017, including health benefits, vacation, sick leave, other paid time-off, and retirement package.
- d. What is your intention regarding PLT staff, their present positions and salaries? If you intend to keep all or some of them in place, what binding assurances are you willing to make to them upon transfer?
- e. Who would manage the program? And if from your existing staff, what are their qualifications and other responsibilities?

3. Adequate appropriate funding to follow PLT/Financial structure

Context: AFF currently invests about \$2.1 million annually to PLT's operating budget including all overhead costs. The program has been able to raise about \$700,000 each year in earned income and contributions, so the net operating deficit, exclusive of overhead costs of \$1.085m (now covered by AFF general fund). Please respond to the following:

Questions:

- a. Provide the 2014-2017 finances for your organization, including a detailed budget for 2017.
- b. What are your current reserves?
- c. What is the amount of funding you will require from AFF to support the program? How did you come up with that number?

- d. How will you continue to sustain the program once AFF's funding has been spent? How much money did your organization raise in 2016 and from what types of sources? If you are not successful in raising the funds through grants and donations for PLT what other sources of funding would you be able to allocate to PLT programming?

4. Adequate time to successfully make a positive transition

Context: PLT currently has contracts in place with vendors to provide on-going system support and other services. PLT also has MOU's in place with over 50 state and international organizations that all have varying expiration dates. We also have contracts in place with warehouse and fulfillment operations. We also have office space, storage space on site, mailing facilities, copying facilities, kitchen, meeting rooms with AV equipment, and conference call capabilities.

Questions:

- a. When do you propose to effectively take over the operational leadership of PLT?
- b. What key elements do you believe must be in place at the time of transfer to make it successful?
- c. What will you have to change about your organization to integrate PLT?
- d. How would you house the PLT staff?

5. Program Fidelity

Context: PLT is a program that teaches students how to think, not what to think about complex environmental issues. We provide curriculum materials, professional development and network management. Visit plt.org to get the full picture of all that we offer.

Questions:

- a. Do you intend to continue or evolve PLT's programming, curricula, and professional development?
- b. Will you commit to continuing the forest lens of PLT?
- c. Will you commit to continue to use evaluation and testing for the program and its elements?
- d. Will you commit to continuing the science-based, fact-based orientation of PLT?

6. Network Fidelity

Context: PLT for over 40 years has supported and worked with and through a network of partners who invest in the implementation of the PLT program on a state-wide basis. Annually our partners invest over \$2.5 million in direct expenses and over \$5 million in in-kind contributions.

Question:

- a. How will you support and engage our network in the program going forward?
- b. What experience or expertise do you have in supporting a national network of diverse, state-based organizations that implement programs on a state-wide basis?
- c. Will you continue to work with AFF and the American Tree Farm System?

7. Governance

Context: PLT currently has an Education Operating Committee with co-chairs. One of the co-chairs serves on the AFF Board of Trustees. The EOC meets twice a year in person to provide advice and guidance to the staff and Board on PLT program operations. The EOC reviews and approves the annual work plan and budget that then is finalized by the board.

Questions:

- a. What is your organization's governance structure? Provide a list of current board members.
- b. How do you intend to involve PLT in the governance of your organization?
- c. What role do you foresee for the Education Operating Committee?

8. Intellectual property/Copyrights/TradeMarks

Context: AFF currently owns the copyright on all PLT curriculum materials and several trademarks for our programs.

Questions:

- a. What experience or expertise do you have in these areas? How would you like these rights transferred?

9. Partners

Context: PLT has been working with partners at the national level, such as National Association of State Foresters, Green Schools Alliance, US Forest Service, US Fish and Wildlife Service, Bureau of Land Management, Wildlife Habitat Council, and North American Association for Environmental Education.

Questions:

- a. What national or international partners do you have in place?
- b. How could these partners work with and be supportive of PLT?
- c. How will you seek to maintain current partnerships at the national level?
- d. How do you assess the health of your partners and network?
- e. What opportunities do you see in growing partnerships through your organization?

10. Reputation impact of alignment with a new organization

Context: PLT is highly regarded for the quality of its materials and professional development, the fact-based, science-rooted nature of the education, and its use of evaluation to shape all that it does. It is this reputation that gives PLT access to classrooms and our partners. In order to maintain PLT's Education/non-advocacy positioning, AFF maintains clear and distinct operations from our forest policy advocacy, including an organizational separation of staff responsibilities, a separate website and logo, and other mechanisms.

Questions:

- a. Change often brings new questions and scrutiny to things – what reputational risks do you see with transfer to your organization? How will you manage to mitigate them?

- b. What issue advocacy does your organization undertake and how might that affect PLT? How will you ensure that advocacy activities of your organization are separated from PLT's educational content?