

Developing Your Annual Plan

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Who we are.

Who are you?

What would you like to know?



The Value of Planning

- Promotes healthy communication
- Creates a shared understanding among board, staff, CALs, etc.
- Acknowledges the contributions of both partners to the partnership
- Streamlines the CA State Parks approval process
- Aligns revenue or fundraising goals
- Provides a foundation for staff/board/CAL changes (a tool for orientation)
- For growth oriented associations, provides a baseline
- Allows for an annual evaluation process
- Helps manage requests from volunteers, donors, other park staff, etc.
- Provides a built-in template for CAL reports to the board!

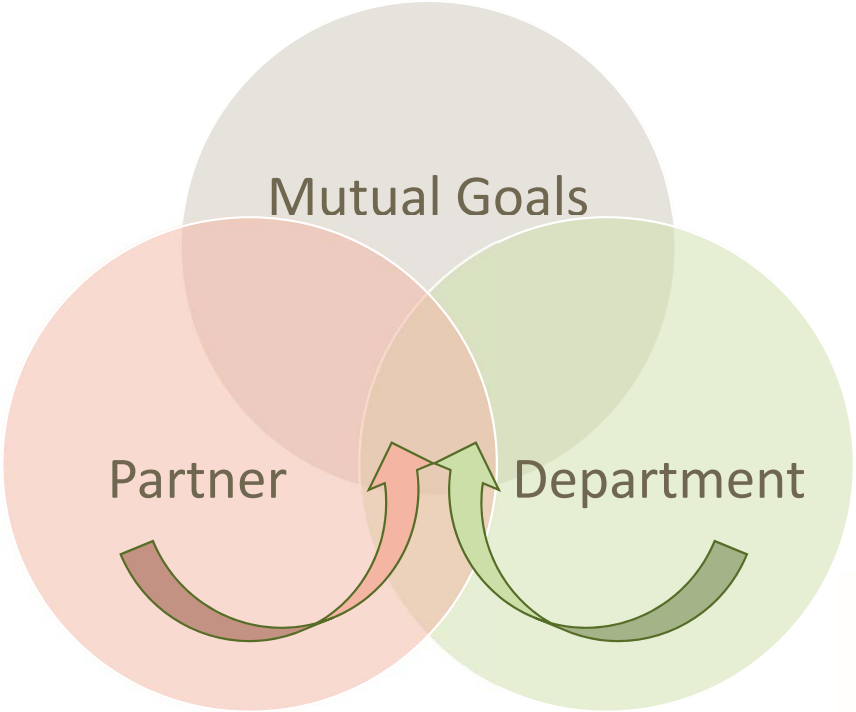


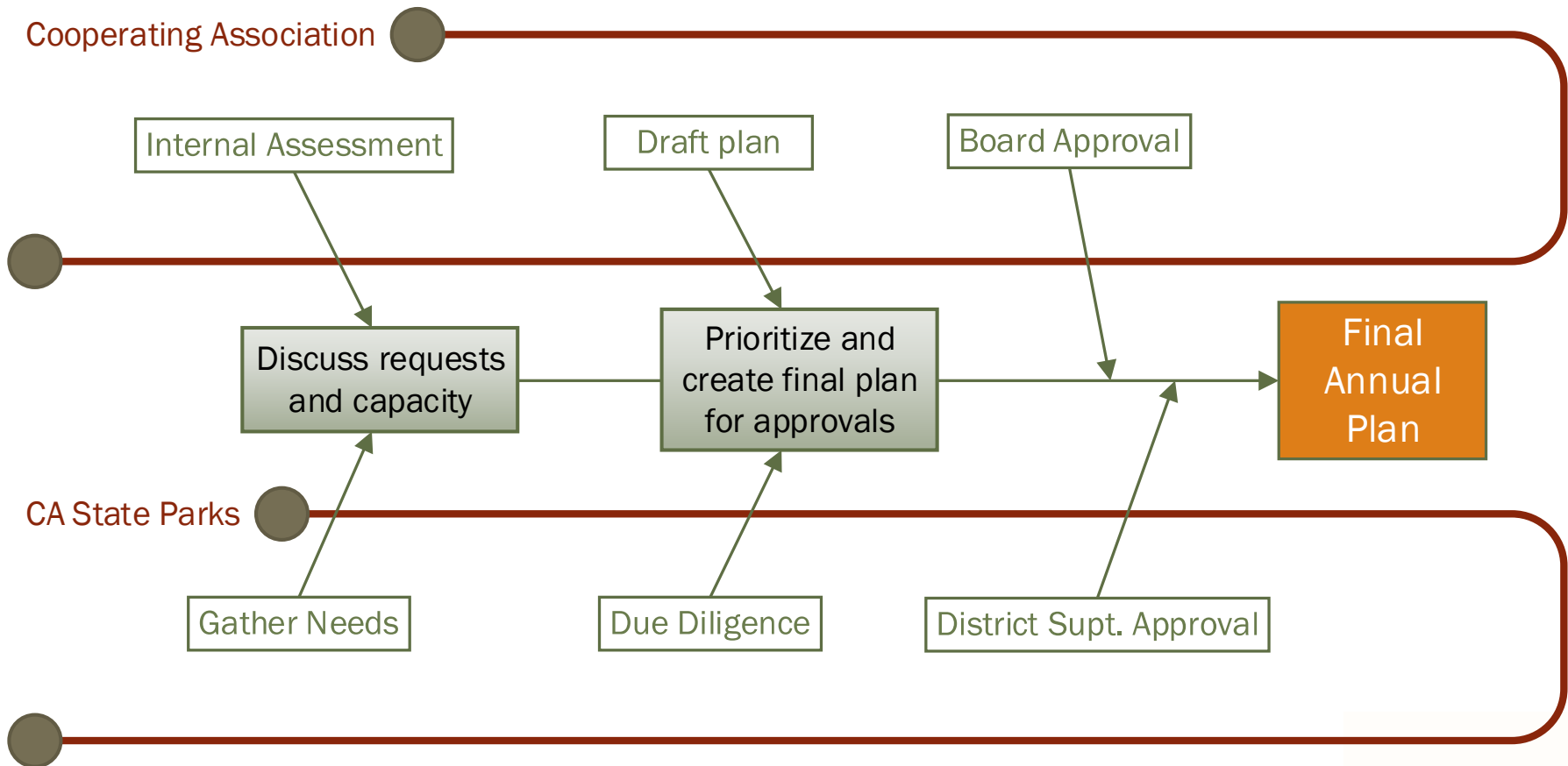
The Greatest Value of Planning is Going Through **the Process**

What do you find valuable about the planning process?



The Process





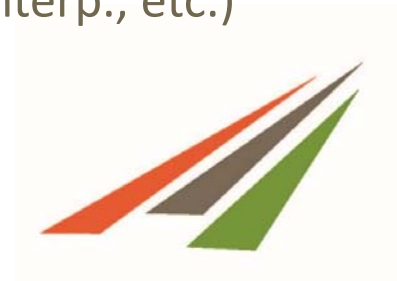
Step 1 – Association’s Internal Assessment CA State Parks’ Gather Needs

- The association evaluates the organizational capacity for support in the coming year
 - What is the available funding?
 - What are the implications on cash flow?
 - What in-kind support can be offered for projects or programs?
 - Output = realistic list of association support
- The CAL evaluates and solicit needs for the coming year
 - Does your supervisor need to weigh-in? Core staff? PID list?
 - Which projects will appeal to the association and their donors?
 - Which projects can advance if matching funds are leveraged?
 - Output = prioritized list of potential funding/program/project needs



Step 2 – Meet as Partners, Part 1

- Review and discuss what the needs are and the preliminary list of association resources
 - Eliminate any requests that do not seem feasible or meet the interests of the association
- Also discuss what CA State Parks resources are needed in order for the association to provide the support
 - What CA State Park facilities are needed? (e.g. office, retail, fundraising, association programs, etc.)
 - What CA State Parks personnel are needed? (Leaders, VIPs, CAL, Interp., etc.)
- Output = a combined list of potential projects



Step 3 – Association Drafts the Annual Plan CAL Conducts Due Diligence

- Draft the plan based on the information discussed at the first meeting
- CAL due diligence includes:
 - Vetting feasibility with appropriate district staff
 - Seeking necessary approvals for:
 - Facility use
 - Project support
 - Use of human resources (staff or VIPs), request leadership attendance if needed
 - Vet any new or special projects with district leadership and/or Partnership Division staff
 - Approve inventory, if appropriate



Step 4 – Meet as Partners, Part 2

- Prioritize based on:
 - Available resources
 - How feasible the use of resources are in the coming year
 - Timing
 - Appeal to donors
 - Value to CA State Parks



Step 5 – Association Board Approval

Step 6 – District Superintendent Approval

Final Annual Plan!



What Goes Into The Plan



Programmatic Activities – Park Support

- Funding of CA State Parks positions, programs, or special projects
- Anticipated donation(s) of goods
 - e.g. interpretive signage, equipment, supplies for programs
- Interpretive sales (hours of operation, goals, improvements, etc.)
- Interpretive programming
- Volunteer support
- Other services provided to CA State Parks
 - e.g. marketing, recruiting, other consulting



Programmatic Activities – Association Operations

- Fundraising
 - May or may not include use of CA State Park resources
 - If it includes use of CA State Park resources, be sure to list those resources
- Capacity-building efforts or other organizational investments
 - e.g. a new POS system or website revision
 - Board development goals
 - New fundraising initiatives
- Volunteer management activities
 - for cooperating association volunteers only – record VIP support in park activities



Miscellaneous

- Anything else where documentation would benefit the partners
 - Record new processes (e.g. cash handling or change to funding requests)
 - Note significant policy updates as they may affect CA State Parks
- Special projects for the upcoming year



The Format



Sample Annual Plan



**Portola and
Castle Rock
Foundation**

2019 ANNUAL PLAN

- A. **PARTIES:** This Annual Plan is part of the Cooperating Association Agreement between California Department of Parks and Recreation (State Parks) and the PORTOLA AND CASTLE ROCK FOUNDATION (Partner), dated March 1, 2018. All terms and conditions of the Cooperating Association Agreement are hereby incorporated by reference.
- B. **YEAR:** The Park and the Partner mutually agree to undertake certain projects and programs (Identified Projects) in the year starting JANUARY 1, 2019, and ending DECEMBER 31, 2019.
- C. **IDENTIFIED PROJECTS, ROLES and SCHEDULE:** Identified Projects to be undertaken are described below, along



Anza-Borrego Foundation 2016-17 Annual Plan

Executive Summary

In 2016-17 year, ABF will continue its effort on capacity building by leveraging the 50th anniversary of the organization. This includes an emphasis on outreach, youth education, land acquisition and park support. Personnel is at full capacity with two new support positions beginning in June 2016. Another significant goal for the year is to make progress, hopefully in the form of a commitment, with DPR taking title to ABF properties.

	Land	Education	Park	Sales	Operations
Key Strategies	<ol style="list-style-type: none"> 1. Acquire approx. 200 additional acres by spring 2017 2. Pursue conveyance of ABF property to DPR 3. Begin campaign for Dueling property including signed PSA, funding prospects and seed funding by May 2017 	<ol style="list-style-type: none"> 1. Raise awareness and teach the public about ABDSP through 50th anniversary celebration 2. Evaluate and determine a new plan for youth education (Camp Borrego) in 2018 and beyond 3. Continue educational programming around UCI and/or park programs to approx. 800 adults throughout the season 4. Outreach to about 2,000 throughout the season 5. Provide additional ABF assistance to the Visitor Center w/Ed Coord in-store 2 days/week 	<ol style="list-style-type: none"> 1. Provide \$35,000 in direct park support from Sales proceeds 2. Continue to increase the park's program capacity with assistance from Education Manager throughout the season 3. Research process of World Heritage Site designation for ABDSP 4. Increase marketing efforts by gaining dozens of mentions for ABDSP in traditional media 5. Provide free-day-use weekends 6 times during the season to bring new audiences to park 	<ol style="list-style-type: none"> 1. Provide additional ABF staff assistance to the Visitor Center w/Interp Sales Dir in-store 2 days/week 2. Continue efforts to strengthen relationships with volunteers 3. Recruit 2-4 volunteers by Dec 2016 to assist in operation of State Park Store 4. Conduct 4-5 promotional events to encourage sales during the season 	<ol style="list-style-type: none"> 1. Continue progress on strategic plan 2. Enroll about 500 new ABF members 3. Continue development of Century Circle and increase number of targeted asks 4. Launch ABF endowment by fall 2016 5. Continue efforts to market ABF to the Borrego Springs and SoCal communities 6. Determine a plan for management of ABF's assets for investment by Sept 2016
Human Resources	<ul style="list-style-type: none"> • Dick Troy, Land Committee Chair • Land Committee • Paige Rogowski, Executive Director .12 FTE • Julie Gerson, Land Program Coordinator .66 FTE 	<ul style="list-style-type: none"> • Joan Schneider, Education Committee Chair • Education Committee • Briana Puzzo, Education Mgr.7 FTE • Ashley Kvitck, Education Coord. .8 FTE 	<ul style="list-style-type: none"> • Advocacy Task Force • Dave Van Cleve, Leader of World Heritage Site project • Paige Rogowski, Executive Director .12 FTE • Briana Puzzo, Education Mgr. .3 FTE • Ashley Kvitck, Education Coord. .2 FTE 	<ul style="list-style-type: none"> • Bill McDonald, Retail Committee Chair • Retail Committee • Chris Rogowski, Interpretive Sales Director 1 FTE • Kathy Jorgensen, Sales Assistant .38 FTE 	<ul style="list-style-type: none"> • Ernie Cowan, President • Lynn Rhodes, Finance Committee Chair • John Peterson, Advancement Committee Chair • Linda Tandle, Gov't Affairs Committee Chair • Paige Rogowski, Executive Director .76 FTE • Bri Fordem, Donor Relations Manager 1 FTE • Lauren Poole, Staff Assistant .75 FTE
Income/ Expenses \$1,112,300/ \$1,150,974	\$304,600 raised through contributions and grants; \$304,444 cost (\$250,000 on direct acquisition cost and \$77,601 on administration)	\$115,900 earned through contributions, grants and program registrations; \$169,239 cost	\$28,800 raised through contributions and grants; \$55,501 cost	\$294,000 earned through sales and contributions; \$132,300 cost of goods sold and \$144,304 cost (including \$35,000 in park support)	\$265,000 earned and raised through contributions, grants and mitigation; \$154,122 cost
Additional Documents	Acquisition Strategy Land policies RLF grant proposals 2013 DPR/ABF Lease Agreement	Annual Education plan 2025 Camp Borrego Vision 2012 UCI/DPR/ABF MOU	2015 World Heritage Site proposal CDD Annual Support Letter (TBA) 2013 DPR/ABF Cooperating Agreement	Interpretive Sales Revenue Policy Volunteer Job Description (TBA) Annual Inventory List Product Review Policy	Annual Development Plan 2015-16 Budget 2015-2018 Strategic Plan



2018 DPR 973 PART 4 - ANNUAL PLANNING

The Olompali People Cooperating Association

UPCOMING ANNUAL PLAN

1. Regular Interpretive/Educational Tours and Programs

Friday through Sunday Educational/Interpretive tours are led by the TOP/VIPP volunteers in the Olompali Frame House Visitor Center and Museum.

The Olompali Ethnobotanical Garden is open seven days a week for visitor self guided tours.

TOP Board Members/VIPP Janet Bodle and Rich Cimino conduct **Quarterly Bird Walks**. The quarterly bird walks are offered to beginning and experienced birders to view Olompali's diverse avian residents touring the old ranch road past the park's reservoir. Participants see migrating species as well as a wide variety of species that thrive in the park's oak savanna and open grassland.

TOP Board Member/VIPP Diane Einstein leads **reserved tours and school tours**. Diane takes tour participants on walk and talk tours from the park's parking lot, to the Visitor Center/Museum, through the ranch complex—including the Camilo Ynitia Adobe, to the Ethnobotanical Garden and recreated Coast Miwok Village, all the while relating the cultural stories of Olompali's five cultural eras. Of particular interest for 3rd grade school groups is Diane's Olompali Coast Miwok cultural history tour.

2. Publications/Marketing

Design and Production will continue for the following:

- Hard Work at Olompali booklet, directed to park visitors.
- Olompali brochure and trail map, tri-fold, directed to park visitors.
- The Olompali People brochure, tri-fold, directed to membership recruitment.
- Bird Walk flyers, directed at the media and park visitors.
- Bat Night flyers, directed at the media and park visitors.
- Olompali Volunteer Work Day schedule and parking pass.
- Novato Museums Guide brochure, colored photo tri-fold, directed at the community.

Distribution

In addition to having these publications available at the Olompali Visitor Center and Museum, these publications are distributed at the Marin Museum of Contemporary Art, Museum of the American Museum, Novato History Museum, Hamilton Field Museum, the Space Station Museum, Novato Chamber of Commerce, and Novato Department of Parks and Recreation.

E-mail distribution of event flyers to media, schools and e-mail distribution list.



2019 Sierra State Parks Foundation Parks Workplan

Project	Budget	Status
Washoe Meadows		
Wildflower Hike	\$100	Pending
Follow progress of Management Plan		
Emerald Bay		
VH Lakeside Garden Fence Install	\$12,000	CSP crew to install.
VH Sod Roof rehab/wildflower planting	TBA	CSP Staff to complete project/SSPF provides materials
Chiefton Room Curtains	\$3,000	Create new fabric and fabricate
Hallway stain glass window repair	2,000	Approved to seek private vendor to repair
VH Living Room curtain evaluation	TBA	
Turret repairs	\$450,000	Seeking CSP funding
Install webcam		CSP approved. Staff working on plan and costs
Visitor Center	TBA	Refurbish diorama exhibit area.
General maintenance	30,000	Park Restoration Specialist Hired
Fannette Island trail rehab/visitation	TBA	Working with CSP and Kyack Tahoe for solutions
VH 90 Celebration Events		Events planned and tickets on sale. Staff trained.
VH Courtyard Rehab	TBA	Approval to contract our with Thyme to Plant
DL Bliss		
Set up Visitor Center operations		VC to open for the season June 7.
Sugar Pine Point		
Purchase new custom tablecloth	260	complete
Complete lakeside garden rehab	26,000	Contract with Thyme to Plant
Plaster Contract	50,000	Working with parks to obtain bid
Tennis Court rehab	TBA	Seeking preliminary bid with Sierra Skyline Construction
Snow Trails	\$8,000	Season complete, season wrap-up meeting in June
Masonry repairs	TBA	Evaluation this summer for 2020 work
Building Assessment	TBA	To be completed this summer
Housing solution	TBA	Joint use of a dorm trailer
Visitor Center Visioning Plan	20,000	Waiting for follow-up by CSP
Kings Beach		
Junior Lifeguard Program	\$5,000	Program to begin June 2019
Donner Memorial		
Spanish language brochures	2,000	Working with CSP staff
The Donner Project	\$1.8 M	
Nature Trail rehab and signage	1,000	complete
General		
Implement new POS system	15,000	complete
Operate Historic House Tours		complete
Operate Visitor Centers at B,SP,VH		complete.
Update website and Tahoe Parks APP	\$7,000	Expected completion June. Website complete



What Questions Do You Have
About Annual Planning?



Best wishes for the planning
process and thank you!

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