PENNSYLVANIA
Parks & Forests
FOUNDATION

Chapter Handbook

June 2017

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I. Financial Policies

A primary mission of the Pennsylvania Parks and Forest Foundations is to assist with the creation of citizen support groups (friends groups). These groups provide a means for the supporters and users of Pennsylvania's state parks and forests to contribute to the conservation and upkeep of our publicly-owned land.

Becoming a chapter of the Pennsylvania Parks and Forests Foundation allows friends groups to solicit donations to be used exclusively for their park or forest without the burden of acquiring tax exempt status, conducting audits, or filing taxes. All the energy of the group can be focused on support of their park or forest. To become a "PPFF Friends Group", a memorandum of understanding and other paperwork must be completed and approved by the PPFF Chair and Secretary. The complete information is available from the PPFF President, Marci Mowery, at mmowery-ppff@pa.net.

Participation as a friends group also requires that the following procedures governing financial matters be followed.

In order for the Foundation to comply with auditing, tax and other legal requirements, it is essential that we have the necessary information for all income received and expenses paid. All income received for the PPFF friends group must be forwarded to the Foundation as soon as possible where it will be kept for the exclusive use of the friends group less the applicable fees. Likewise, any expense requiring payment from the account should be sent to the Foundation for payment.

PPFF financial functions are currently performed by the Foundation office at 1845 Market Street, Suite 202, Camp Hill, PA 17011. The normal Foundation point of contact is Debbie Whitmoyer at dwhitmoyer@paparksandforests.org or 717-236-7644.

To minimize confusion, only one person from the chapter, normally the treasurer, along with the park manager or district forester (unless otherwise appointed) should conduct financial transactions with the Foundation. The name and contact information must be kept current with the bookkeeper at the above email address.

A. Deposits

Deposits into accounts should be made using the standard PPFF Deposit Form found on the Friends Groups Resources page of our website at http://paparksandforests.org/friends-groups/resources/ or are available from PPFF. This is in an Excel spreadsheet format and is available electronically from the website or via email. A paper version can also be provided upon request. We ask that you assign a deposit ID number to each deposit so it will be easier to reference at a later time. **When sending deposits to PPFF, send both the hard copy of the deposit form (keep a copy for your records) with the deposit as well as email an electronic version of the spreadsheet.**

1. On the deposit form, indicate the account and a deposit id (such as 02-2007 or FORCSP 01-07, etc.).
2. Complete, in detail, the specific information from each check. This is then forwarded to our database and/or used for thank you letters. This information should be the name and address of who the check is from (not to), check number, amount and type of revenue. Note: Tags are not sales, they are actually donations so please identify as such.
3. In the lower right corner of the form is a deposit summary. Fill this out for every deposit.

An additional set of deposit tracking forms are also available at the website. These comprehensive deposit tracking forms break down your transactions into all of the categories that you will need for your annual report in January and ***can save you time if you learn to use them***. They may look intimidating at first but actually save time in the long run. If you would like assistance in how to use them, please contact Pam at pmetzger@paparksandforests.org.

Send your deposits to PPFF at 1845 Market Street, Suite 202, Camp Hill, PA 17011. All checks should be endorsed with the PPFF "For Deposit Only" endorsement stamp that will be provided to the individual responsible for the account. Check with PPFF if you have not received your stamp. *NOTE: Checks made payable to "Commonwealth of Pennsylvania" or "Department of Conservation and Natural Resources" cannot be accepted and will be returned to you.*

As noted above, be sure to maintain accurate records for deposit transactions. Deposits should be in the form of checks or money orders made payable to "PA Parks and Forests Foundation" or "PPFF" with the chapter name listed in the memo line.

CASH deposits will not be accepted. Please convert cash to a money order payable to PPFF.

All donations and payments for chapter memberships amounting to $100 or more will receive an acknowledgment letter from PPFF. Your donors want to hear from **you.** We encourage you to acknowledge donations under $100. A template acknowledgement letter is located in your "Millions of Memories" binder. *Please note that if the money is generated for an advertisement, merchandise or vendor space, etc., the payer will not be getting a letter for tax deduction purposes.*

If a check is returned by the bank for any reason, the amount of the check and any fees will be deducted from the friends account. You will be notified of the returned check and may need to follow through with the individual who gave the money to try to get another check issued. PPFF is not responsible for ensuring the replacement of bad checks.

B. Expenses

Check requests must be submitted using the standard PPFF check request form found on our web site at www.PAParksAndForests.org or available from PPFF. The request must be accompanied by the original invoice or other appropriate documentation such as a musician contract. Checks will be sent to the vendor unless otherwise indicated on the request form. Please allow time for checks to be processed as they must be circulated for two signatures. If special mailing is needed, the cost of the mailing will be billed to the group account. *No checks will be written on an account where the transaction would place the account into a deficit situation.* Please avoid multiple payees on a single request form.

Invoices may also be submitted, with signed check request form, via fax at 717-236-0972 or by email to Debbie Whitmoyer at dwhitmoyer@paparksandforests.org. The original copies should be kept in your file to produce upon request.

Checks are written every Thursday and every effort is used to mail signed checks by the following Tuesday, barring holidays and vacations.

If checks are needed in advance for special event, please allow time for the processing such as in the case of a check being needed to pay a musician at an event.

C. Sales Tax Reconciliation

For those groups who intend to sell items or run a concession as a means of raising funds, the foundation must submit monthly sales tax returns and payment to include all the sales by chapters. Please contact PPFF to let us know that you will be conducting sales so we can coordinate the proper reporting to the PA Department of Revenue. Please check with us if you have a question about the taxable status of a particular item you intend to sell.

In order to complete the PA Sales Tax Return, we must know the total amount of sales conducted, total amount of taxable sales, and the amount of tax collected every month. This information should be notated in the Deposit Summary of each deposit form that includes sales. Funds for any sales made in a particular month should be received by the PPFF office for deposit **before** the 15th of the next month.

PPFF has sales receipt books available to groups to help track sales tax. Contact the office if you would like sales receipt books. Please check with PPFF if you need clarification of any sales tax issue.

D. Imprest Accounts

Imprest accounts are local checking accounts that function much like a "petty cash" account for friends groups. Eligible groups* have found them convenient for handling small expenses for which the amount is unknown prior to payment like groceries for an event, or for payments that are due immediately. An amount of the group's funds, usually $500 to $1,000, is either deposited into a check card (preferable) or into a local checking account through one of our preferred banks. The group submits a monthly accounting of expenses and is reimbursed for those expenses to bring the Imprest Fund back up to the original amount.

*Eligible groups have been in operation for at least one year, have a minimum of $2,000 in their PPFF account, and are in compliance with all financial procedures including timely submission of annual reports. If you have a question about your eligibility, please contact the PPFF President.

The only funds deposited to the Imprest Fund would be for the initial advance and subsequent reimbursement checks or fund transfers from PPFF. **For proper auditing, all funds received by the group go to PPFF and are then dispersed back to the group for approved expenses. Donations and other revenue received by the group must not be deposited into the imprest account.**

An exception to the above would be for groups who accept credit cards where the fees get credited to their imprest fund. In this case, on a monthly basis, all funds must then be sent to PPFF for the total sales. These accounts come under extra scrutiny from our auditors who require that all funds are properly recorded. A second exception is the conversion of cash received by the group. In this case, the cash is deposited into the imprest account, and a check in that amount is immediately sent to PPFF via a deposit form for deposit into the group's PPFF account.

Groups must request replenishment for any checks written in order to maintain the authorized level. **Requests for replenishment must include a properly executed check request form, a copy of the check, and a copy of the invoice or receipt from the vendor.**

The imprest fund account should be reconciled monthly with the bank statement. PPFF must also receive a copy of the monthly bank statement. Additional information may be requested particularly for the end of year audit.

Additional Imprest Account Details

If the group is authorized to open a local account (the imprest account):

- The account will be opened under the name of "PA Parks and Forests Foundation, Group Name."
- The account will include the PPFF EIN number which will be provided upon approval of the account **and** PPFF's Camp Hill address so the bank may send directly to us a duplicate monthly paper or e-statement.
- Up to three persons will be designated as authorized users of the account, one of whom **will** be the President of PPFF. Once the group has local user information, the paperwork, including the signed contract, should be forwarded to the President of PPFF for completion. PPFF will then forward the completed forms and, if opening a local checking account, a check for approved amount directly to the bank to the contact supplied. If opening a Visa Check Card Account, a transfer will be made at this point.

1. If a group has an imprest checking account, to issue a check the group must:
   a) Receive a dated invoice from the vendor with a full description of the service/item to be paid.
   b) Make copies of all checks written if a copy is not provided with the monthly bank statements.
   c) Keep a copy of the invoice with the check copy.
2. Once funds are depleted, submit a reimbursement request to PPFF. Reimbursement requests must be submitted with a properly executed check request form to which copies of invoices or receipts and check copies(unless provided with bank statement) have been attached. Accounts must be in good standing according to this procedure in order for reimbursement checks to be processed.
3. Keep in mind that check transactions should be for invoices requiring **immediate payment and for smaller amounts only.** All other requests for payments, <u>including reimbursements for group members' expenses</u>, should be sent to PPFF for processing. This will allow your account to maintain a balance.
4. All imprest accounts are subject to annual review as part of the PPFF audit.
5. **If a group fails to comply with these guidelines, PPFF retains the right to close the imprest account.**

Visa Low Balance Check Card

PPFF reserves the right to designate the Low Balance VISA Check Card as the group's imprest account.

PPFF offers groups the ability to avoid some out-of-pocket expenses to local stores with the use of VISA Check Cards. For groups who desire this option, an individual checking account will be opened at First National Bank in Camp Hill with funds not to exceed $500, transferred from the group's PPFF account. The group's designated user will receive a VISA Check Card which can be used for small local purchases.

Steps to open a VISA Check Card Account:

1. Submit a request, including the amount of funds desired for the account (not to exceed $500), in writing.
2. Within 15 days, the group will receive a letter stating the authorized amount for the account and terms of the group's responsibility for the account. Accompanying the letter will be a bank information form to be completed by the group's treasurer and another authorized signer from the group. The president of PPFF will also be an authorized signer on all accounts. This allows PPFF to easily transfer funds when

needed or to access the account in the event of an emergency such as if banking materials become lost or stolen.

3. If the group agrees to the terms listed, the signed agreement should be returned to PPFF along with the completed bank information form and clear photocopies of two forms of identification for each signer.
4. When the completed paperwork packet is returned, PPFF will open the account. The bank will then generate additional forms to be completed by signers. Once these additional forms are submitted to the bank, one debit card will be issued and mailed directly to the designated group user.
5. PPFF and the group will receive a duplicate statement of the account monthly. Groups will be required to keep track of purchases. Any overdraft fees will be the responsibility of the group. The group will reconcile the account monthly.
6. When funds are depleted, submit a reimbursement request to PPFF. Reimbursement requests must be submitted with a properly executed check request form and copies of invoices or receipts. If the group is in good standing according to these procedures, the requested funds will then be transferred from the group's PPFF account into the group's VISA Check Card account.
7. All VISA Check Card accounts are subject to annual review as part of the PPFF audit.
8. **If a group fails to comply with these guidelines, PPFF retains the right to close the Visa Check Card Account.**

Steps for Imprest Checking Account:

1. Submit the request, including amount of funds desired, in writing.
2. Within 15 days, the group will receive a letter stating the authorized amount for the account and terms of the group's responsibility for the account. Our preferred method is a check card which we will establish for you. If the group agrees to terms listed, the signed agreement should be returned for processing of the check.
3. If PPFF and the group agree to a local checking account, whenever possible, groups should use an affiliate of a bank with which PPFF has a relationship. Advantages of this are expedited paperwork to open the account and quicker funds availability when the account is in need of reloading. We have expedited arrangements with the following banks:

   First National Bank – https://www.fnb-online.com/#
   Citizen's Bank – citizensbank.com/branchlocator/
   PNC Bank – pncbank.com
   Fulton Bank – fultonbank.com

   Please check the websites for local affiliates, and inform us when you make your choice so we may forward the appropriate paperwork to you.

Imprest Reporting Requirements:

Monthly:

Monthly statements and supporting documents must be submitted to Debbie by the 20th of the following month. The report must include:

- A clear listing of all checks written including date, check number, payee, purpose, and amount (PPFF will supply form upon request).

- A clear listing of all deposits made including date, description and amount, including any taxable sales.

    - Deposits may be made to convert cash to check to be deposited in PPFF main account.
    - Deposits may be made for imprest re-load.
    - Deposits for any other reason are considered non-compliant and may result in a warning.
- Report should reconcile with bank statement and be signed by Treasurer and Chair.
- If a statement/report is not received in a timely manner, the account will not be reimbursed.
- If three months of reporting are missed, the account will be fined $50 and the group will receive a warning.
- Warnings may also be issued for: 1) operating from the checking account; 2) working from a petty cash account; 3) misuse of tax exemption forms; 4) maintaining a balance greater than the agreed upon balance in the imprest checking contract; and 5) unauthorized deposits.
- After three warnings, the group's account will be closed and the group will be responsible for paying all costs associated with reconciling the account, including, but not limited to: bookkeeper's time, penalties for late fees related to any overdue taxes, additional audit fees and other IRS related concerns.

Annually:

- All board officers must read, sign w9/1099 requirements and have forwarded any w9's to Debbie prior to 12-31.
- If PPFF has to reconcile, track down, or otherwise try to reconstruct a 1099/w9 trail, an hourly rate applies.
- No later than January 20 of each year, PPFF should receive a copy of your December bank reconciliation so that we can close our books in a timely manner for auditing purposes. If materials are not received, a warning will be issued.

E. Solicitation of Funds

Any time a group is soliciting funds, the following language MUST be included:

The official registration and financial information of the Pennsylvania Parks and Forests Foundation may be obtained from the PA Department of State by calling toll-free within Pennsylvania 1-800-732-0999. Registration does not imply endorsement. Pennsylvania Parks and Forests Foundation is a 501(c)(3) nonprofit organization - contributions to which are tax deductible to the fullest extent permitted by law.

A hard copy or electronic memo describing the solicitation effort must be sent to the PPFF Camp Hill office so that we can be apprised of donation efforts and be prepared to answer any questions which might be generated.

PPFF, in turn, maintains the annual Charitable Solicitation Registration with the PA Bureau of Charitable Organizations (BCO). If you need copy of any paperwork, or require certain registration numbers sometimes needed in fundraising efforts, contact PPFF and we will provide you with these documents.

According to PA Law, fundraisers hired to assist with raising funds must be registered with the PA Bureau of Charitable Organizations. Be sure to check on this and communicate with the PPFF President regarding the hiring of a professional fundraiser.

Account Reports

Quarterly statements will be forwarded for each account. If you require additional reports, please contact the accounting office and one will be forward it to you. All accounts are audited annually by a certified public accountant.

Closing Accounts

Notify PPFF if you need to close the account for any reason. Please note your recommendation as to how any remaining funds should be dispersed for PPFF purposes. Use of all funds must be consistent with the purposes of the donor/PPFF/DCNR and are subject to the approval by the PPFF President.

Supporting PPFF Administrative Costs

As a nonprofit organization, PPFF must generate operating funds including the funds needed to administer the individual friends' group accounts. To do this, modest fees and interest remain with PPFF as indicated below. Fees will be applied to the friends' group accounts annually at the end of the fiscal year.

Fees

The group shall pay to PPFF a one-time affiliation fee of $35. All monies collected by the group shall be maintained and disbursed by PPFF, pursuant to the MOU.

The following account fees were made effective July 1, 2014:

- $2 per check written
- $2 per deposit
- $5 per returned check

These fees cover not only the check, but postage and other related costs.

Questions and Suggestions

The financial policies and procedures for PPFF will continue to evolve as we strive to make the organization more efficient and effective with the least cost to all concerned. Your questions and suggestions are always welcome and should be addressed to PPFF President Marci Mowery at mmowery-ppff@pa.net.

II. The Annual Report and Communications with PPFF

Each January, all chapters are required to submit an annual report to PPFF. The annual report outlines the chapters' accomplishments and challenges in the previous year. The report serves multiple purposes:

- It provides a basis for our assessing training and technical support needs for the upcoming year;
- It provides the facts and figures (including money raised and hours donated) we share with our board and the general public through our own annual report and social media promotions (and so gives us an opportunity to tell a larger audience what great work you are doing);
- Because it lists your board members for the upcoming year, it provides our insurance carrier(s) with the information they need to provide coverage to your board members.

The annual report form is posted to the Friends Resources page of the website at the end of each calendar year and is available there to download in either an Excel (multiple worksheet) or pdf form. The completed form is then emailed to Marci Mowery at mmowery-ppff@pa.net and Pam Metzger at pmetzger@paparksandforests.org.

Likewise, each member of your board must ***annually*** complete and sign a conflict of interest form. This form is a requirement of our auditor and our insurance carrier. These forms are available at the Friends Resources page of the website.

One of the key elements of the annual report and your initial formation documents is the designation of a person to act as the "lead contact" with PPFF. With so many groups to manage and so much information flying around, a good bit of our communications take place through email. Consequently, we (and you) need someone who is a frequent user of email to be your lead contact with us. This is usually – but is ***not always*** – your chair.

We provide a monthly *Tidbits from Marci* email that often contains updated information on policy changes internally, news and training opportunities we discover in the course of a normal day, workshop and retreat announcements, contests and fun information you can share and use. *Tidbits* goes to every member of your board and is archived at the Friends Resources page of the website.

III. Risk Management

PPFF's Risk Management Policy
PPFF and its chapters are committed to practicing effective risk management to protect the safety, dignity and legal rights of others as well as our human, financial and intangible assets.

A. Defining Risk

Risk is any uncertainty about a future event that threatens your organization's ability to accomplish its mission. Viable threats endanger your organization's core assets and thereby limit your ability to provide critical services. Generally, nonprofit assets fall into the following categories.

- People – Board members, volunteers, employees, clients, donors, and the public.
- Property – Buildings, facilities, equipment, materials, copyrights, and trademarks.
- Income – Sales, grants, and contributions.
- Goodwill – Reputation, stature in the community, and the ability to raise funds and appeal to prospective volunteers.

Risk management is the process of reducing potential damage to your chapter and its activities. Risk management applies to both operations of the chapter and activities and events held by the chapter. A risk management plan does not have to be complex, but it should cover the range of programs and volunteer opportunities offered by the chapter.

For risk management to succeed, you must acknowledge the reality of risk.

B. The Role of the Board

The primary responsibility of a nonprofit board of directors is to guide the organization in accomplishing its mission. In fulfilling this obligation, the board has a legal duty to use the organization's assets prudently. The board's oversight role empowers it to exercise tremendous influence in ensuring that the organization protects and uses its core assets solely to further the goals of the organization. The board should pay close attention to the risks inherent in its governance activities.

When the board takes the lead in protecting the organization's assets, it supports the organization's successful operation. The principal risk management goals for most nonprofits are:

- Protecting clients, staff, volunteers, and the public from harm;
- Conserving the agency's assets for its community-serving mission; and
- Ensuring that resources are available to compensate individuals harmed by the organization's activities.

They do this by:

- Establishing long-term goals and short-term objectives for the nonprofit's program initiatives, board, and staff;
- Measuring performance against established goals and objectives;

- Approving an action plan to meet the organization's goals and objectives;
- Monitoring the plan's implementation; and,
- Ensuring the availability and proper use of funds through active participation in fundraising programs and the development and monitoring of financial management and fundraising policies.

C. Types of Risk

Injuries to Clients, Employees, Volunteers, and the Public
The nonprofit's major risk or exposure is the possibility of someone getting hurt. The injury may be the result of the organization's negligence or a non-fault accident. Every nonprofit, when serving clients or raising funds for its programs, must exercise a level of care necessary to protect people from harm.

Ways to avoid injury:

- Do routine safety inspections in areas where volunteers will be working or where events will be held.
- Decide if there are items that need to be fixed to reduce possible injury.
- Look for risks and develop a plan to address or prevent them.
- Eliminate hazards when possible.
- Warn users about hazards and explain how to remain safe.
- Be aware of the types of injuries that might happen. For example, if an event is held in the heat of summer, prepare for potential heat exhaustion and dehydration.
- Provide directions for aid as a precaution.

Damage to Property
Every organization owns some property even if it is antiquated office furniture, trail care equipment, or computers. The damage or destruction of the nonprofit's property could impair the organization's ability to continue operations. What would the impact of a major property loss be on your organization?

Many nonprofits do not consider the risk of damage to property that it has borrowed or rented. Most property rental agreements assign responsibility for damage to the property to the lessee. A word of caution: many organizations assume that a general liability policy will cover damage to another's property. However, most general liability policies exclude damage to property owned by or in the care, custody, and control of the insured.

Fraud
Every nonprofit is vulnerable to fraud. The theft or misappropriation of funds can have severe consequences. A single major theft of funds or equipment could jeopardize a nonprofit's viability. The organization may suffer a cash flow crunch, loss of donor confidence, and reduction in services

Legal Requirements
Nonprofit organizations, as holders of the public's trust, are subject to specific laws and regulations. Organizations must meet IRS requirements to maintain their tax-exempt status. The Internal Revenue Code addresses the organization's charitable mission, political and lobbying activities and proper accounting of income and expenses.

To manage the risks of legal compliance, every organization must research and keep current on the rules, regulations and statutes that apply to its operations.

D. Steps in Risk Management

- Look for risks—pull out a piece of paper and make a list of what could go wrong. Look at the assets listed in the beginning of this chapter when as you brainstorm. "What could go wrong?"
- Evaluate your risks—in this step you decide what risks your group can tolerate, which can be reduced and which need special attention. Assess the risks in light of your mission.
- Decide how to control your risks—"What will we do?" "How will we pay for it?" Controlling risk normally falls into the following categories:
    - Avoid—do not offer a service you consider too risky.
    - Modify—Change the activity so the chance of harm occurring and the impact of the potential damage are acceptable.
    - Transfer—Shift at least the financial aspect of risk through contract or insurance.
    - Retain—Accept the risk and prepare for the consequences.

One way to avoid risk is to develop policies and procedures. Policies communicate the character and goals of your organization. Procedures are the underpinnings of the operations that offer step by step guidance. Policies and procedures provide the consistency necessary to manager risk and they need to be communicate to all involved.

In many cases, chapters will be following the standards and procedures put forth by DNCR or PPFF, but there may be cases when the chapter may have to establish their own. Policies and procedures:

- Establish a standard of behavior and a common body of knowledge.
- Support unpleasant, but necessary requirements.
- Provide orientation and training tools for volunteers, board members and clients.
- Help ensure operational consistency.
- Strengthen your defense if you are sued.
- Policies and procedures need to be made, shared, adhered to and revisited regularly.

E. Where to Go For More Information

Nonprofit Risk Management Center, www.nonprofitrisk.org.

No Surprises: Controlling Risks in Volunteer Programs, Tremper, Charles and Kostin, Gwynne, 1993.

Mission Accomplished: A Practical Guide to Risk Management for Nonprofit Organizations, Jackson, Peggy M., White, Leslie T., and Herman, Melanie L., 1997.

Healthy Nonprofits: Conserving Scarce Resources Through Effective Internal Controls, 1996.

Guidebook for Directors of Nonprofit Corporations, published by the American Bar Association, 1993.

The Board's Role in Risk Management: More Than Buying Insurance, Tremper, Charles and Babcock, George, National Center for Nonprofit Boards, 1994.

IV. Guidelines for Working with Elected Officials

Learn who your state legislators are and develop a good rapport with them. Do the same with your local government officials.

Always keep elected officials apprised of activities occurring in your park or forest and invite them to attend. But be prepared: they may try to take a chunk of time in the agenda.

Keep the park manager or district forester informed of your intentions if you plan to contact government officials directly representing the friends group about a park/forest related issue. If you do plan to contact an elected official, the friends' group *board of directors must agree* to this activity by majority vote. It is not in the group's or the park/forest's interest if an individual decides to "end run" the chain of command of your park or forest.

Be open and helpful to elected officials when they call for information.

Seek out ways to include elected officials in functions, activities, sponsorships, ceremonies, etc. except if the event falls immediately (roughly six weeks) before an election. As a nonprofit, you cannot give the appearance of endorsing a candidate.

Don't play favorites with elected officials.

Keep elected officials "in the loop" as much as possible. They can be a good ally to your work. The more they understand your work, the better position they are in to support your work.

Foster good relationships by being an active part of the community and by responding to appropriate requests for help. REMEMBER: As a non-profit organization, you CANNOT endorse or support political candidates. This also means that you must evaluate sponsorship of events to see if it might be perceived as an endorsement.

Be proactive and innovative.

Respect elected officials' opinions and position in the community, but keep in mind that being respectful does not mean agreement.

If controversy is anticipated, contact the elected official immediately so that he/she can be informed and not a recipient of rumors.

If you need advice in working with elected officials or are unsure if an activity is "legal" under non-profit guidelines, contact the Pennsylvania Parks and Forests office at (717) 236-7644.

V. Elements of a Successful Chapter

Use this form to evaluate the success of your chapter and to better understand where improvements might be made. This is also a great exercise to do before launching into a planning process. Rate your chapter on a scale from 1 to 10, where 1 is low and 10 is high.

Our Chapter	***1***	***2***	***3***	***4***	***5***	***6***	***7***	***8***	***9***	***10***
Has a clear sense of purpose (mission) with goals and objectives.										
Has a positive attitude, "We CAN make a difference."										
Has a full partnership with our park or forest.										
Has a full partnership with PA Parks & Forests Foundation										
Performs an annual evaluation of its programs										
Regularly and timely completes our annual report										
Has a budget that reflects our goals and objectives										
Performs regular outreach to community and beyond										
Successfully recruits new members										
Regularly celebrates our accomplishments										
Regularly provides volunteer recognition										
Successfully recruits new leaders										
Has more than 10% ***active*** members of our total membership										
Has fun!										

A healthy chapter means a better state park or state forest!
A healthy chapter makes it easier to recruit and maintain new leaders, volunteers and members.
A healthy chapter builds a bridge between the park and the general public.

Based upon your evaluation, what changes could be made to strengthen the chapter?

VI. Chapter Governance/Board of Directors

A. General Information

The Chapter is governed by the PPFF By-Laws and may not create its own by-laws. [By-Laws, Article II, Section 2.01(b)(2)]. The Board has the power to conduct, manage, and direct the business and affairs of the chapter. This means that duly-elected board members are the only members of the Chapter eligible to vote at meetings.

The Board will consist of not less than three (3) and not more than fifteen (15) directors with voting rights. In addition, the Board may include not more than five (5) ex officio directors without voting rights.

Board members are elected at the Chapter's annual meeting in November. [By-Laws, Article III, Section 3.07(a)].

The park manager/district forester or his/her designee will serve as ex officio director without voting rights. Honorary or emeritus directors with no voting rights may be elected by the board. (By-Laws, Article III, Section 3.04.)

Directors will receive no salary for their services as directors.

B. Officers

- Chair and Vice-Chair. The Board may elect from among the voting directors of the Board a chair and one or more vice-chairs. The chair of the Board presides at meetings of the Board. He/she assumes a leadership role and sees that all orders and resolutions of the board are carried into effect. The chair orients new board members, appoints committee chairs, organizes evaluation of the chapter, and mediates conflict as needed. In the absence of the chair, a vice-chair shall preside at meetings of the Board and shall perform such other duties as may be requested by the Board.
- Secretary. The secretary takes minutes of Board meetings and records attendance and votes of the directors. The secretary sees that notices are given in accordance with the by-laws or as required by law; and in general performs all duties of the office of secretary and as may be assigned by the Board or by the chair.
- Treasurer. Unless otherwise directed by the Board, the treasurer collects and receives money earned or contributed to the Chapter and deposits all funds collected as treasurer in an account managed by PPFF according to PPFF financial policies. The treasurer can also request disbursements from the account and maintains accurate records of all transactions. The treasurer shall also perform other duties as may from time to time be assigned by the Board or by the chair.

C. Recruiting Board Members

Look for members who:

- Are local to the park or forest, or members who can commit the time to travel to board meetings if they are not local.
- Can give or raise money.
- Have an ability to work well with others and have an ability to follow through on commitments.
- Have time to give and a willingness to give it.

- Have an interest in and enthusiasm for the park or forest, the goals of the chapter, and the mission of DCNR.
- Have a genuine desire to serve and are not self-serving.
- Have good judgment and an open mind.
- Bring skills or talents to the board not already represented on the board.
- Have good community credibility and visibility.
- Represent a diverse cross section of the population utilizing the park or forest.
- Have an ability to listen, analyze, and think clearly.
- Are willing to attend board and committee meetings.
- Are willing to develop skills, if needed, to improve the effectiveness of the board.
- Demonstrate honesty, tolerance, and a commitment to the cause.

D. Keeping Board Members

- Define roles for board members that utilize their talents.
- Keep members informed—send meeting minutes out in a timely fashion, send them copies of press releases, etc.
- Keep meetings moving—everyone has a limited amount of time to give; honor that by sticking to a preset agenda and moving the meeting in a timely fashion.
- Celebrate successes, achievements, contributions!
- Thank board members for their time, energy, and talents.
- Help board members achieve their goals and recognize achievement.

E. The Job of the Board

- Determine the mission and purpose of the chapter, in cooperation with the park or forest staff.
- Provide planning and guidance.
- Ensure adequate resources for the functioning of the chapter.
- Develop and approve the annual budget; ensure proper financial controls.
- Enhance chapter's public standing—articulate the mission, garner support for the chapter and its programs, improve public relations.
- Recruit and orient new board members.
- Adhere to legal and ethical standards of operation.
- Assure that the chapter has enough people to accomplish the goals of the chapter.
- Assure appropriate meeting content and process.
- Adhere to PPFF guidelines—provide reports, etc., in a timely manner.

F. Role of Individual Board Members

- Attend all board and committee meetings to which you are elected.
- Be informed about the chapter's mission, services, policy, and program.
- Review agenda and supporting material prior to meetings.
- Serve on committees.
- Make a personal financial contribution to the organization.

- Inform others about the organization.
- Suggest possible nominees to the board or committees.
- Keep up to date on policies and happenings.
- Assist in carrying out fiduciary responsibilities.
- Follow Robert's Rules of Order at meetings.

G. Board Committee Descriptions

Purpose of Committees: Committees are established to facilitate the work of the board. Each committee is responsible for the overall direction of its area. Committees are composed of members of the board, as well as staff or non-board members, as appropriate. The board chair or president and park manager/district forester is an ex-officio member of the committee. Committee chairs are appointed by the board president/chair and provide written reports on their committee's progress at each board meeting and convene committee meetings as needed. Possible committees include:

Potential Standing Committees	***Their Typical Roles***
Board Development	Ensure effective board processes, structures and roles, including retreat planning, committee development, and board evaluation.
Executive	Oversee operations of the board; often acts on behalf of the board during on-demand activities that occur between meetings, and these acts are later presented for full board review.
Finance	Oversees development of the budget; ensures accurate tracking/monitoring/accountability for funds; ensures adequate financial controls; often led by the board treasurer.
Fundraising	Oversees development and implementation of fundraising; identifies and solicits funds from external sources of support.
Marketing	Identify potential markets, their needs, how to meet those needs with products/services/programs, and how to promote the programs
Public Relations	Represents the organization to the community; enhances the organization's image, including communications with the press
Nominating	Identifies strengths and weaknesses of board, coordinates recruitment of new board members, develops board orientation, evaluates nominating process.
Volunteer Recruitment	Develops volunteer descriptions, matches volunteers to tasks, organizes volunteer recognitions, communicates with park/forest staff

H. Maintaining Healthy Boards

One job of the officers of a board of directors is the care and feeding of the directors. This means maintaining a sense of teamwork that is a key ingredient to a successful chapter.

One way of achieving teamwork is to monitor the needs of new and existing members, and to outfit the right person to tasks that need to be accomplished.

Limiting the terms of office can also strengthen a board by keeping fresh leadership in the mix. It also motivates members to actively recruit new board members. Recruitment should include the entire board. When new members are recruited, pair them with an existing member to serve as a mentor and offer any necessary training to ensure a good and productive board member. Have an orientation session for new board members.

Boards, almost by definition, go through a natural energy ebb and flow. Don't be discouraged by this cyclical process; as long as the chapter has overall forward motion, things will be fine.

Train your leaders! Training is important to ensure an adequate skill set to get the job accomplished.

Be flexible.

I. Where to Go For More Information

The Nonprofit Center at LaSalle University, www.lasallenonprofitcenter.org. Great resource for classes, workshops and other links.

The Free Management Library, www.managementhelp.org. An extensive listing of non-profit topics.

BoardSource, www.boardsource.org. Excellent resource for building effective nonprofit boards.

VII. Running Effective Meetings

A. Meeting Preparation

- Choose a meeting date and time that allows adequate time for participants to prepare and understand agenda.
- Have specific objectives – know what you want to accomplish and share these with participants so that they know what to expect.
- Keep meeting to a manageable size.
- Reserve a room that accommodates participants comfortably and with a regulated temperature.

B. Running the Meeting

- The chairperson, or meeting leader, needs to know his or her role. The chair can neither be too strong or too weak.
- Start on time.
- Review agenda and make any additions. Assign times for each item and stick to the times.
- Have a mixture of easy to accomplish and more difficult items (if there are any) on agenda.
- If someone had pre-assigned tasks, they should report early in the meeting.
- Stick to the agenda.
- Avoid side conversations.
- Encourage participation.
- Work to keep the meeting at a comfortable pace – not moving too fast or too slow.
- Summarize the discussion and the recommendations at the end of each logical section.
- Have a method of evaluation.
- Keep accurate notes.
- Follow Robert's Rules of Order.
- Give everyone a voice.
- If a meeting is going to be long, have built in breaks.
- Stick to the agenda and end on time.

C. Problem Solving Steps

- Define procedure—How do I get from point "A" to point "B"?
- Define issues.
- Understand interests (including personal motivation).
- Generate alternatives.
- Assess alternatives.
- Select alternatives—remember, sometimes you have to agree to disagree.
- Implement—convert words to action!
- Avoid problems by monitoring people's expressions and body language; intervene early.

D. After the Meeting

- Send minutes to all participants in a timely manner.
  - Minutes record the decisions of the meeting and the actions agreed. They provide a record of the meeting and, importantly, they provide a review document for use at the next meeting so that progress can be measured - this makes them a useful disciplining technique as individuals' performance and non-performance of agreed actions is given high visibility.
  - Highlight any commitments made by attendees and action items.
- Follow up on items that need attention.
- Put items that need to be revisited on next agenda.

Praise! Praise! Praise! (From Fellowship for Intentional Community, http://wiki.ic.org/wiki/Running_effective_meetings)

> Praise people twice as much as you criticize. Never let any good deed or action go unheralded in the group. Say thank you publicly at every meeting. Recognize the value of people's contributions at the beginning or within the meeting. One of the best ways to boost group morale and keep it high is to notice peoples work and praise it regularly. Keep in mind: volunteers are CHOOSING to be there, they don't HAVE to be there.

E. A Quick Note on Group Process

- Understanding how a group works can lead to more productive meetings.
- Assess communication—Who does and doesn't participate? What is the nonverbal communication that is occurring? Who is listening?
- Assess influence—Who has it? Are there rivalries or struggles? Is anyone trying to dominate?
- Decision making—How are decisions made?
- Tasks—Who clarifies discussions? Who asks for suggestions? Who tests the group? Who keeps the group on target? Who invites others into discussion? Who is the harmonizer?
- Atmosphere—What is the climate of the group? Are there shifts in the atmosphere—what caused the shifts? Are there subgroups in the meeting?

F. Where to Go For More Information

Mind Tools, http://www.mindtools.com/CommSkll/RunningMeetings.htm
Fellowship for Intentional Community, http://wiki.ic.org/wiki/Running_effective_meetings
Meeting Wizard, http://www.meetingwizard.org/meetings/effective-meetings.cfm

VIII. Chapter Planning Worksheet

Planning is a necessary part of a successful chapter, and a process that can serve to solidify the group. Chapters of various sizes and levels will probably take different approaches to planning, from the more elaborate long-term processes to the more informal free-form style. The key is to engage the full board, and at times committee members and membership, in the process so that all programs are integrated into a whole and the entire chapter is invested in the plan.

State park or state forest staff needs to be involved in the planning process; remember, all plans must meet the park or forest management plans.

The following serves as a guideline for the planning process. It is one of many such guidelines that exists, and as such, does not need to be followed verbatim. You are encouraged to use a process that is right for your chapter to help you meet your desired vision.

Planning is an important tool for setting goals and building a chapter; it identifies resources and provides direction, and it provides for a way of measuring success.

A. Process

The planning process can be exciting, but it does require a small commitment of time and energy, both during the planning process and in annual reviews of the plan. Do not get bogged down in discussion; instead, focus on setting a timeline for developing the plan and stick to it.

Tips:

- Stick to a deadline in the planning process
- Some planning processes require many people while others require a few. The key is to generate a high level of investment and commitment from people who will support your goals.
- Some people find that the best planning sessions are done in a retreat format, with the planning the centerpiece of the retreat.
- While a plan can be developed to cover a three to five year time period, plans should be reviewed on an annual basis and modified as necessary.

Take a minute and ask yourself a few questions:

- Why does your chapter exist?
- How would you like your chapter to be known? For what would you like it to be recognized?
- What would you like to accomplish over the next year? Three years? Five years?

B. Resources

List the resources that are available to you, such as staff, associations, etc.

C. Strengths and Weaknesses

Before planning begins, it is important to take an objective look at the chapter to determine its strengths and weaknesses. By understanding your strengths and weaknesses, you can better assess your ability to reach your goals.

Activity –Identifying the Chapter's Strengths and Weaknesses:

- Have each member make a list of strengths and weaknesses of the chapter.
- Share the lists to create a master list.
- Have members list the top five strengths and the top five weaknesses that must be taken into consideration for the planning process.

D. Opportunities and Threats

Opportunities and threats are an external analysis of the environment in which the chapter functions.

Opportunities are external factors that might facilitate the reaching of goals. For example, an opportunity could be a relationship with a potential donor; your status as a PPFF chapter, etc.

Threats are external factors that could prohibit or stall the reaching of goals. For example, a threat could be a change in park management, a new administration, or the loss of a key chapter leader.

Activity – Identifying the Chapter's Opportunities and Threats

- As a group, brainstorm the opportunities or threats that could impact the success of the plan.

E. A Mission Statement

The answer to the above questions will help you to clarify your chapter's mission. A mission identifies your reason for being and can breathe life into your chapter by providing a focus. Mission statements are generally concise, no more than three to four sentences long. Some recommended that the statement should be under 25 words. Board members should be able to state their mission statement from memory.

Examples of mission statements:
The Friends of Greenwood Furnace State Park exists to keep history alive and promote the educational and recreational programs of the park and surrounding areas.

The Presque Isle Partnership works to protect, preserve and enhance the park—to make it a better place for all users and for all those interested in preserving our natural environment.

The Friends of Ridley Creek State Park work to preserve, protect, restore and enhance the beauty of the park.

Activity - Designing the Mission Statement

This activity works best with a group of four to ten people. You will need a flip chart, felt pens, masking tape, note pads, and pencils.

Procedure:

- Have each person write a mission statement for the chapter. The mission statement should reflect, as they see it, the chapter's reason for being and should reflect what the chapter does.
- Have each person read their statement. Others are not to comment on the statement, there is no "right" or "wrong". On the flip chart, note the words or phrases that are significant.
- Once everyone has had an opportunity to read their statement and have key words or phrases noted, review the list and choose the words or phrases that people feel should be in the mission statement.
- Have each person write a mission statement using the "key words" from the last step.
- When everyone has read their draft, vote on the two best and use these as the basis of the final draft.
- Develop the final mission statement.

Note: Activity adapted from National Audubon Society's Chapter Leader Handbook.

F. Goals and Strategies

Goals

Once you have your mission statement, the next step is to develop goals for your chapter. A strong mission statement will help you to set the goals, as the goals must align to the mission statement. Goals determine the course of the chapter in a broad perspective. In the early phases of a chapter, your first projects should be ones that are readily achievable and will build your organization through success.

Questions to ask:

- What are our top five goals for year one? Two? Three?
- What strategies must we use to reach our goals?
- How do we evaluate our successes and accomplishments?

When developing the chapter plan, it is important to remember that you are representing the friends of a park or forest and not individual organizations. *Goals and strategies must be developed with the best interest of the park or forest in mind and must fit into the park or forest management plan.*

Objectives

Objectives detail how a chapter will meet its goals. Setting short-term objectives is like developing a road map to reach a goal. Objectives should be achievable, measurable and accomplished within a certain time frame. This helps turn a plan into action, and builds a sense of accomplishment and pride, which in turn can foster increased member participation.

***Example of an objective*:**
Increase membership by 10% in one calendar year.

G. Action Plan

The action plan outlines the steps needed to take to reach the objectives outline during planning. Using our example from above, "Increase membership by 10% during one calendar year," we might have the following actions:

- Develop a membership brochure.
- Staff four community events to raise awareness about our organizations.
- Have membership brochures available at all park events.

Keep in mind that your plan is intimately tied to your budget. While you may want to build a new cabin, if you only have $1000 in your account, there will be many steps necessary to reach this goal

H. Evaluation

Evaluation is a critical step in the planning process and provides valuable feedback on the success of the programs of the chapter. The evaluation can be designed to best meet the needs of the chapter. For example, with measurable objectives, the objectives could be evaluated on an annual basis. Your annual PPFF report serves as a means to evaluate your achievement.

I. Budget

Once a plan is in place, a simple budget (example shown) will allow the chapter to determine how much money it needs to raise in order to reach their goals.

Chapter Income		***Chapter Expenses***	
Membership		***Work Projects***	
Fundraising Events		A.	
A.		B.	
B.		C.	
Grants		***Monthly Programs***	
A.		***Membership***	
B.		***Newsletter***	
Donations		***Conference/Training***	
Merchandise Sales		***Contingency***	
Total Income		***Total Expenses***	

A copy of the chapter plan needs to be sent to the PPFF office to be retained in the chapter's file. File an additional copy with the park or forest office. All reports should be dated and be approved by the district forester or park manager.

IX. Communications

A. Develop a Communications Plan

Developing a communications plan is important. Plans are updated every year and answer the following questions:

- Who needs to know about the group's specific programs and issues?
- How are the materials and announcements of key information disseminated throughout the group (internal communications) and to others (external communications)?

B. Key Questions to Ask When Developing a Communications Plan

Your communications plan will ensure that the right information is communicated to the right people. To do this your plan should answer the following questions:

- Who are your key audiences? Consider the following:
  - Your officers, board members, committee chairs, other key leaders
  - Your members (if applicable)
  - Your volunteers
  - Local media
  - Local, state and national decision-makers
  - General public
  - Others (including partners, key influential people, stake holders)
  - PPFF
  - DCNR
- What information should be communicated to each of these audiences?

C. Internal Communications

- Create a planning calendar that covers the first three to six months of the year that lists all board meetings, monthly meetings, scheduled trail or other work, annual special events, etc. Circulate it to your board and volunteers, post it on your website, publish it as a flyer or brochure and distribute to local outlets.
- Create an email distribution list and communicate regularly with your group leaders and volunteers who have access to email.
- Participate in PPFF's email discussion group—this is designed for PPFF chapters to talk to one another in a discussion format, ask questions, share and gather ideas. Contact Pam at pmetzger-ppff@pa.net to learn more.
- Create a folder of orientation materials that can be given to new board members including your brochure, newsletter and any other information that will help orient them.
- Figure out a way to transfer the group's important papers to incoming presidents. Develop a checklist of items that they are responsible for and should have during their tenure including: chapter handbook, PPFF policies and procedures; copies of minutes; chapter creation paperwork (Articles of Association, MOU, etc.)

D. External Communications

Develop systems for outreach by regularly communicating information about your group's programs to your membership and the broader community including:

- Create a website and keep it updated. Local media regularly check websites for background information when covering your group's events and activities. It is an invaluable tool for keeping the public informed of the great work that you are doing, for recruiting volunteers, attracting new members, and raising funds.
- Develop a newsletter or other regular communications piece and post it on your website. Announce upcoming meetings or special events, list your chapter officers and contact information. Make sure to include local media to your distribution list including local newspaper editors, television and radio producers.
- If you have a membership, develop a membership brochure which describes your organization and its activities.
- Attend local events and set up an information table with information about your group and its activities.
- Develop an inexpensive table-top display that can easily be taken to meetings or conferences.
- Get the word out to the community. Make contacts with your local media by developing a media contact/distribution list. Send out regular news releases and media advisories for special events. (See publicity section for more details).
- Work with your park manager or district forester to submit your group's calendar items to the DCNR calendar and to PPFF.
- Develop a communications or outreach committee that can help you to brainstorm other creative ideas to attract public recognition of your activities as well as help you do some of the legwork! Remember, outside people may sit on committees.

E. Publicity

Your group's programs and activities can benefit from greater public awareness and wider community exposure through publicity.

Why Communicate Your Message?
The numerous benefits of effective publicity include:

- Generating support for your group's issues and programs.
- Improving cooperation with local officials, educators and other local conservation groups.
- Increasing chapter membership through greater exposure.
- Attracting new members and volunteers.
- Increasing attendance at your programs and events.
- Promoting your projects and programs to potential funders, including foundation and agency staff, businesses and individuals.
- Educating public officials about the benefits of local projects. Let them know why your group and its projects are important to the community. Explain why public officials should care about your project and why they should support programs and policies that make your work possible.

- Reaching out to the community—let the public know about your good work and invite them to participate in your programs and events.

F. Working with the Media

Get to know the media in your area and create a list of media contacts including:

- Newspapers—daily, weekly, college.
  - You will want to include any reporters that may be on staff that relate to your message—outdoor writer, travel writer, health, etc.
  - More often than not, your message is probably considered "softer" news, more story-like news v. hard, breaking news. In this case you will want to contact a feature reporter or a reporter who writes for the "Living", "Outdoor" or "Community" section. Editorial writers can also be an important part of your list.
  - Newspapers publish a regular calendar of events—depending on the paper they can run weekly, monthly, quarterly and as a special supplement to the newspaper. Contact your paper to find out the particular deadlines and add this information to your contact list.
- Magazines—including local, regional and statewide.
  - Magazines are always looking for exemplary conservation projects and environmental leaders to profile. However, magazines need more lead time – often three to four months. Contact the magazine to find out when you need to submit your article and photos. In addition to articles, remember to submit letters to the editor and calendar events to local and regional magazines.
- Community, organizational, school and business, and other organizations newsletters—print and on-line.
- Television and radio stations including free community calendars

Do not wait for the media to come to you. Reach out to media outlets to inform them about what you are doing, invite them to speak with you, and ask them to tour the project you are working on.

Other ideas for working with the media:

- Identify and develop relationships with key contacts in the media. Meet with newspaper editors. Educate them about your projects.
- Pick a positive, outgoing member of your group to be your spokesperson with the media.
- Localize the story. Tie the story to the community.
- Be creative. Make the story interesting to readers, viewers, and listeners. Show how it is unique.
- Be timely in your communication with the media. Get your stories to them as soon as possible.
- Invite the media to your local events. Send out a media advisory a week before the event. Provide directions to the event. (See example.)
- After the event, follow up with the members of the media who did not attend. Tell them what happened at the event. Give them any hand-outs that you distributed.
- Send interesting photographs with captions to newspapers. Include local people, but do not make the photos appear crowded. Heads should appear no smaller than the size of a nickel in the photo. Include the following information in the captions: who, what, when, where and why. Make sure names and titles are spelled correctly and make sure that you have signed photo releases of all identifiable faces.
- Tell reporters about future events.
- After the event, thank reporters for coming.

- Write press releases, letters to the editor and op-ed pieces (see next section).

Writing a Press Release, Letter to the Editor or Op-Ed Piece

A *press release* is designed to provide newspapers, television and radio news departments with detailed information from which they can write an article or develop a story. A *letter to the editor* is usually limited to about 300 words and allows the author to take a stand on an issue. It should be well-researched and include information to support the author's position. An *op-ed* is a 600-900 word essay that appears opposite the editorial page and gives the author the chance to educate the public and advocate a strong position. Similar principles apply to writing all three pieces.

- Think about the interests of the public. Why would the public be interested in the story?
- Start with your key message. Begin with the important information. The lead sentence should tell the essence of your story. The first paragraph should tell the reader who, what, when, where, why and how.
- Keep it simple and concise. Write for no higher than an eighth grade reading level. Do not use jargon or clichés.
- Use facts and figures to support your main point. Include information that will be relevant and understandable to the audience. Make sure the data is accurate.
- Include the date, title, contact person or author, and contact information.

Press Release Specific Format

- Include your logo (if you have one).
- Include date of release.
- Give contact information and make sure contact person is at the number on the release date.
- You want your release to read exactly like the ideal story you would like to see in the paper.
- Use the headline to convey the most important message of the story.
- The dateline (city, and sometimes state, where the story takes place) should be in capital letters.
- The first paragraph or "lead" provides the main idea of the story.
- A quote from a key member of your group or expert should be included high in the story.
- Supporting paragraphs answer the how and what of the story and give the reader more details of the lead. All paragraphs in the release should be short and concise.
- If the release goes over one page, indicate this by adding the word "more" at the bottom of the page.
- On continuing pages, use a slug line at the top of the page to identify the release, as well as the date and page number. For example, "Page 2/PPFF Announces Grant Awards/August 11, 2006"
- If appropriate, include a web address where more information is available.
- All releases should end with a boilerplate that describes your organization. Mission statements are often adapted to this purpose.
- End all releases with ###, centered on the bottom of the page (see example format).

Media Advisories

The news advisory informs reporters of the time and place of a news event you will conduct such as a news conference or a public event including a workshop or demonstration.

Media Advisory Specific Format

- The title tells the recipient what the event is about.
- Give sufficient background information to make your story interesting, but be careful not to give away too much. You want the media to have to come to the event to get the story.
- Give the logistical information in “who,” “what,” “when,” “where” format.
- Be sure to include contact information
- If the event is at a specific location, give detailed directions and a map.
- Always try to include something to pique their interest, such as good visuals, diverse representation from local citizens, refreshments, costumes, celebrities, etc. or some sort of hook, such as a bag of trail mix for a trail opening, plant seeds for a garden unveiling, etc.
- For an upcoming event, make sure to get the point across that you have people for the writer to speak with. Include factual information to drive the importance of the story.
- Send the advisory out a week before the event and have the press release available for the media to pick up the day of the event.

Cautions:

If you question an action, call PPFF before moving forward. As a non-profit organization, remember that we cannot support or endorse political candidates, or appear that we are supporting or endorsing a candidate.

(Some of the information presented here was adapted from the National Audubon Society *1993 Chapter Leader Guide* and *Communicating Your Message* from Pennsylvania Organization for Watershed and Rivers.)

Sample Press Release
(On your letterhead, or create letterhead using your logo/group's name/address)

NEWS RELEASE

FOR IMMEDIATE RELEASE

(Date)

CONTACT: *Name of your group representative*
Your group name
Phone number where this person can be reached
Email address of this person
Website of your group, if applicable

TITLE IN BOLD

Town or City and date/year of news release

Write three to four succinct paragraphs detailing your event or project utilizing the guidelines provided above.

For more information on this project/event contact:

(Give complete Contact Person's information again, including phone number, email and website if applicable)

End with the boilerplate language you developed (using the organization's mission statement).

###

(Placed at the end in the middle of the page, ### signifies there is no more to this release.)

Sample Media Advisory
Contact: Name of your group representative
Your group's name
Phone number of the contact above
Email of the contact
Your group's website

MEDIA ALERT/PHOTO OPPORTUNITY

YOUR CHAPTER'S EVENT HERE

Brief summary statement of the event's purpose goes here.

WHO: Your group's name and any lead partners.

WHAT: Your event.

WHEN: Make sure to list *the day* of the event, as well as *the date and time*, e.g., Friday, August 11 at 2:00 p.m.

WHERE: Where your event will be held and indicate that the directions follow.

(Directions Attached)

CONTACT: List all contacts for the event here with name, title, phone number.

In a short paragraph briefly describe the event or project's details and any photo opportunities.

DIRECTIONS: Make sure to provide accurate directions from all major routes to your event.

From the East:

From the West:

From the North:

From the South:

###

(Placed at the end in the middle of the page, ### signifies there is no more to this release.)

X. Fundraising

As you expand your programs, services, and projects, the need to raise funds comes into play.

The Pennsylvania Parks and Forests Foundation strongly encourages its chapters to seek various means of securing funds in support of their parks and forests. Aside from direct solicitations, possible sources of money include grants, corporate sponsorship, membership as well as projects in local communities (see below). There are, however, existing laws that must followed to avoid problems and protect the organization against government sanction. All chapters need to comply with federal, state and local laws covering monetary dealings. All proceeds, including donations and project results, must be reported by PPFF in our IRS form 990 filings. Money retained by the group could be construed as unreported income and although no profit is realized, it could be construed as a violation of the IRS code.

Since chapters are essentially volunteers working under PPFF's tax exempt status, there is no need for a chapter to register with the Pennsylvania Department of State's Bureau of Charitable Organizations. When your group was made a chapter of PPFF you should have received copies of all the necessary documentation such as registration with the Bureau of Charitable Organizations and state sales tax exemption granted to PPFF and therefore extended to your group. Group members must remember that all solicitations are made in the name of PPFF and groups are technically covered by our registration.

Before you begin any fundraising activity, it is important to remember that successful fundraising comes from nurturing good relationships in the community. It is as important to "friend raise" as it is to fundraise. You are asking individuals, corporations and foundations to make an investment in your organization. To make that investment easier, they need to appreciate and understand your vision and trust that your organization will make good on their investment. The following is just an overview of the types of fundraising activities that could take place as you put together a fundraising program to support your group's projects. Remember: Before applying for any grant, contact the PPFF main office. (Please see the Grant Submittal Policy approved by the PPFF Board of Directors below.)

Potential Fundraising Activities

- Earned Revenue—refers to income generated through the sale of goods and services including program fees, contracts, retail sales, admissions. Even as a non-profit, we are required to collect sales tax on taxable items. Contact PPFF's bookkeeper Debbie Whitmoyer at dwhitmoyer@paparksandforests.org for more information.
- Grants—including those from corporations, community organizations, government and foundations.
- Annual Campaigns—including membership drives, special events and annual giving.
- Membership Drives—focuses on renewing current members and attracting new ones. Generally done through direct mail, it can also be accomplished through telephone drives or one-on-one canvassing at special events or programs.
- Special Events—are a great way to reach a broad audience, attract new members, donors and volunteers and offer something back to the community. The drawback can be that they take a lot of time and effort to coordinate, they may lose money, and they may exclude certain audiences in the community.
- Annual Giving—generally includes reaching out to people outside your membership, although members of your group should also receive your appeals. These donations may be solicited through direct mail, via phone, or face-to-face. The gifts can range from small amounts to major and planned gifts. You can

also become a designated group for memorial or honorial gifts. These are gifts made in memory of a loved one or to honor a special occasion – anniversary, wedding, etc.

Fundraising Ideas

- Host a benefit, such as a special concert or community picnic
- Do a direct mail campaign to attract new members or raise funds for a specific project
- Get board members and volunteers involved with helping to solicit major gifts and sponsors
- Host a community art show
- Sell ads in a newsletter or program guide
- Solicit businesses in the community to help underwrite the costs of your event, donate materials or services.

Your annual plan and budget will determine what type of fundraising effort you need to undertake to accomplish your goals. Contact the PPFF office for more assistance in developing a fundraising plan.

Things to Keep in Mind When Raising Money

Small games of chance such as bingo, raffles, and ticket sales require a yearly permit from your county treasures' office. Contact PPFF for our guidelines relating to small games of chance. As of this writing, all small games of chance are on hold due to restrictive reporting requirements and much confusion generated by the legislature's 2012 rewriting of the small games of chance law.

If your group regularly has a fundraiser that is unrelated to our mission and you gross more than $1,000 from it, you may need to pay business income tax on that income.

If your group sells items to raise funds you must collect and pay Pennsylvania sales tax unless the items you sell are tax exempt. Sales tax is reported on a monthly basis. Contact Debbie Whitmoyer at dwhitmoyer@paparksandforests.org.

Permission is required from the property owner, either private or public, before a fundraiser can be conducted on that land.

When an item or service is given in return for a donation the value of the item or service may not exceed $7.60 (as of 2001 but subject to update). If above $7.60 the value must be subtracted from the total donation to determine how much of the donation is tax-deductible. For example, if a donor receives a $20 pen for a $100 donation he will only receive credit for $80 for tax purposes. Explain the situation when submitting the proceeds for deposit so that receipt letters will be for the correct amount

To discuss any of the above, call Marci Mowery at (717) 236-7644 or email mmowery-ppff@pa.net.

A. Fundraising Tips for Friends Groups: Corporate Donors

Any business entity has the potential to become a corporate donor and sponsor. Current statistics indicate that business or corporations contribute about 5% of the total dollars given to charities and non-profit organizations. This paper is intended to help you narrow your list of companies you choose to approach for donations and to help craft your appeal in the most effective manner. It is intended to be a living document that will incorporate the successful techniques enjoyed by all the chapters of PPFF.

Why do companies want to give?

Companies give for a full range of reason but largely because the act of giving satisfies a need they have. Your job is to identify that need before you approach them and tailor your presentation so that is shows how it meets their need.

Some companies give because their corporate culture has a strong sense of community and community giving. Companies with a large customer base, especially those with a strongly defined regional area of operations, will concentrate their giving to those areas. Utility companies are classic examples of this concept. *Companies which do not produce goods or services consumed by the citizens who use your parks may be less inclined to give. Most businesses want to give in areas of operation, and may also be willing to provide volunteers for projects.*

These are loose guidelines and are not to be applied too stringently as there are many exceptions. Corporations will support causes that are of interest to their employees especially if their employees request the donation

Profile of Good Prospects
Before you start writing letters or calling for appointments you would be well served doing some research.

Identify all the businesses in your region and

Learn as much information about the company as possible in order to make an ask that is personal and focused. One of the best places to find the information is in your local library. The reference section usually contains a business directory such a Dunn and Bradstreet that will give a profile of local companies. The profiles normally contain what the company produces, who the officers are, the total sales and the number of employees.

Identify whether the company is private or publicly owned and the name of any parent companies. The more you know about the company the better the impression you will make on any visit.

Giving Policy
Many companies will have a policy that governs how much money they give to charitable, non profit efforts and what type of projects they support. This is generally public knowledge and may be listed on their website.

There is normally one person, more often than not the public affairs officer, who is authorized to make donations. That person usually can give up to a certain amount without seeking approval from the board of directors. It is very important for you to know the amount and a simple question of the approval official will often produce the answer. Request for larger amounts may result in long delays until the request can be considered by the board of directors. A good method of finding the person in charge of donations is to call the company and ask the receptionists. A few polite questions can product a wealth of information.

Public companies are different in that donations are more at the discretion of the owner. Knowing the interests of the owner as well as the giving history of the company is essential in preparing a request with a chance for success.

Getting a Foot in the Door

Keep in mind that companies are bombarded with asks on a weekly basis, and many have a list of organizations to which they already give. The key to your success is to have your request considered rather than languish in the stack with other letters. One way is to have someone connected with the company provide an introduction to the decision maker. That someone may be a friend of the owner or an employee of the company.

The ideal is to make any request in person. Your letter should state who you are, what you do and why you want a donation. Conclude the letter with a statement that you will call in a week for an appointment to discuss your request. Again don't ignore the importance of company employees and the influence they have on management.

The Presentation

It is preferable to have one person make a presentation but two is the limit. Present a well-dressed and groomed appearance that reflects what is worn in the office. A manufacturing plant will require different attire than a bank. Rehearse all presentations and if you have one person who presents very well, use him or her as much as possible.

Requests for donations to a readily identifiable, specific project will always be better received than a general asking for money "to support our work." Have a folder that contains the mission of the group, some details about the park/forest and if possible information on park/forest usage by company employees. Have a budget for the project you wish to fund and show who else is already contributing. Leave the folder with the company representative and be sure it contains contact information. Finally, show how any contributions will be recognized. Remember: Recognition may need DCNR approval—don't make promises that cannot be kept.

In closing the presentation, remember to thank the company for their time and consideration. Ask when you might check back to hear of the decision.

The Follow Through

Send a thank you letter to the person with whom you met within two days. Thank them for giving you their time and for listening to you presentation. Call back in two weeks if you have not been informed of a decision. If you are denied, treat the effort as a learning experience. Call the person you met with and tell them that you fully understand why your request could not be favorably considered (use the same words they used in turning you down) and ask what you could have done differently that might have resulted in a favorable consideration. More often than not you will get a straight forward and helpful answer.

B. Grant Submittal Policy

Grant writing is one form of fundraising available to friends groups, parks and forests in cooperation with PPFF. The positive side of grant funding is: 1) you can generally raise a large sum of money quickly; 2) it builds relationships with grant-making institutions; and 3) it supports your mission. The downside of grant funding is that: 1) the funds are restricted to what you propose in the application's budget and narrative; 2) grants can be time-consuming to write and manage depending on management guidelines; and 3) grants generally come with timelines that must be tracked and followed.

Due to the volume of grants that friends/parks/forests seek, it is absolutely necessary that PPFF be notified when you plan to submit a grant utilizing our Employer Identification Number (EIN). Information that needs to be provided to PPFF at least two weeks in advance of submitting the grant are:

1. Source of the funds sought and contact information
2. Project being funded
3. Any accounting restrictions
4. Grant deadline
5. Contact of person managing or submitting the grant
6. Budget for grant and a copy of the application

Please see Request for Grant Consideration form available on the Friends Resources page of the website under *Chapter Handbook and Required Forms*. Submitting this information helps us to track where our EIN is being submitted, helps to avoid duplicate asks, and can assist us in better serving you. There has been more than one time a foundation has called here and we could not answer their questions regarding a grant application.

All grant signatures MUST come from the PPFF staff and/or board of directors. Friends groups cannot sign a legal, binding document such as a grant contract. Why? As the holder of the EIN, PPFF is legally responsible for all funds raised and to ensure that funds are spent according to grant agreements.

PPFF will assess a 4% administrative fee on all grants. For the most part, this can be built into the grant request. The reason for this fee is that the accounting requirements to track funds have increased and we need to cover our time for managing the grants, following the accounting protocol required by the grant/IRS/our accountant, submitting or reviewing reports, etc. (For example: A $10,000 grant would result in a fee of $400.) An administrative fee is not uncommon—colleges and universities charge their own departments upwards of 30%! The fee does not apply to any PPFF matching grants we may be able to fund in the future.

If you are considering applying for a federal grant, you must contact PPFF prior to submittal. Some federal grants have such complicated accounting protocol that we need to review these on a case-by-case basis.

If a grant requires an audit by a CPA as part of the final report, the chapter/park/forest will be required to pay for that report out of their account.

Approved by the PPFF Board of Directors: August 18, 2011 (with an annual review required).

C. Small Games of Chance

A 2014 rewrite of the legislation governing small games of chance (including raffles and 50/50 drawings) resulted in the institution of a very specific SGOC process for PPFF and our Chapters. Please see the specific policy and required acknowledgment form on the Friends Resources page under Additional Policies.

XI. Partnering with Others

Partnerships offer opportunities to accomplish goals that might otherwise be unattainable or more difficult to attain. Partnerships can include agreements, cooperative ventures, joint arrangements, alliances, coalitions, and collaborations.

Partners can include other non-profits in your area, civic organizations, schools or universities, religious institutions, government entities, recreation organizations, interest groups.

Advantages of Partnerships

- Save resources—human, monetary, and other
- Reduce duplication of services
- Fosters collaboration
- Gain public support
- Raise credibility
- Increase visibility
- Increase networking opportunity
- Increased potential funding support

Working with partners requires some effort, so venture into it on a small scale initially, tackling bigger projects at a later date.

Identify who you can partner with based upon your goals and work plan. Brainstorm possible partners.

Determine what you want to gain from the partnership and what expectations you have for a partnership.

Meet with potential partners to explain project and explore the pros and cons.

Decide who will do what. Clearly outline responsibilities in writing and what resources each of you will contribute.

Possible Partnership Opportunities

- Grants—grants are often easier to obtain when working with a number of partners. For example, perhaps you would like to develop a disc golf course at Park X. A potential partner could be the local disc golf club.
- Programming—cooperative recreation, education, and special events programs may be improved with an increased number of volunteers, money and supplies available from a partnership.
- Publication—such as shared space in a newsletter. For example, perhaps your park has a number of special interest groups in addition to the friends group. Resources could be pooled for one newsletter that would be a more effective publication promoting the park, events, etc. that would also reach a broader audience, thereby increasing your profile.
- Sponsorships of events—this may defray costs and work load while increasing creativity and access to resources.
- Training—training budgets for volunteers is often limited, so when outside trainers are used, it might be best to work with similar organizations that would also benefit from the training. Example: Working with your local recreation center to host a trail maintenance workshop.
- Purchases—often bulk purchases are less costly than small orders.

Pitfalls

If organizations don't pay careful attention to why they are coming together and how to make their partnership work, there is a strong possibility that the endeavor will fail. It is important to understand WHY you want to partner and chose partners with mutual objectives. It is also important to clarify expectations of all partners in the beginning to avoid confusion later.

Guidelines

Clarify Expectations – Develop an understanding of the shared goals and how you hope to achieve them. Understand the commitments that you are making and what the partner is bringing to the table. Set a reasonable time frame for the project and the partnership.

Understand how you will work together- Establish agreements on who will play what role, who is responsible for key results, how decisions will be made and how progress will be measured. By focusing on these issues at the beginning, many of the problems common to partnerships can be avoided or minimized.

Periodic Assessment—how is the partnership working? Do roles need to be redefined?

Finalizing - Very often, little attention is paid to the final stages of a relationship. How will partnership close? How will success be measured? Celebrate your success.

XIII. Volunteers

Volunteering is an exciting, growing and enjoyable experience. In fact, it is a form of recreation for many people. Friends groups are strengthened in a number of different ways when you involve more volunteers. In addition to getting more help, you create a group of people with a connection to your park or forest, and who can serve as a constituent for it.

When recruiting volunteers, be sure to look at what you are asking the volunteers to do, make it manageable (and fun!), make it attractive, and provide them with assistance and training. Remember: Never ask someone to do something you wouldn't do!

A. Member vs. Volunteer

A member is someone with a defined connection to an organization. A volunteer is someone who contributes time and energy to advance an organization's mission.

Do you need members or volunteers?

- Members—if you are looking for community input, revenue from membership fees, and numbers
- Volunteers—if you need people to assist your organization.

Remember: A member can be a volunteer and a volunteer can be a member, but it is not always so.

B. Finding and Recruiting Volunteers

Yes, you have to work to find volunteers! Most people with an interest in volunteering won't seek you out—you must approach them.

People volunteer for a number of reasons:

To help
Meet people
To network
Increase their sense of self
Assist friends
Skills development
Experiences
Resume enhancement
Prestige
Recognition
Commitment to the cause
Fulfill a personal need or value
To give something back

The type of volunteer event also varies. For example:

- Student community service: many schools now mandate that students give a certain number of hours back to the community.
- One day opportunities—with community groups or work places (corporate volunteers).
- Short term assignments—some people are interested in working on projects with a start and a finish. For example, perhaps there is as community member who would be interested in making signs for an upcoming event.
- Family volunteer events.

- Virtual volunteers—folks who may have an interest in helping out but can't commit to a set time. These volunteers may be willing to design websites, develop brochures, edit the newsletter, etc.
- Adult recreation volunteer events.

Think about why you (and your fellow volunteers) commit time and energy to a state park or forest. Write it down. This is a starting point for developing volunteer recruitment materials. Share these stories—they are compelling reasons for others to volunteer.

When you have an idea of what you need volunteers to do, determine what kind of volunteers can help you do it.

- Look at who currently volunteers or has volunteered in the past—might they be best suited to other volunteer projects? Would they be interested in becoming involved again (if involvement has lapsed?)
- Often people volunteer because others have asked them. Start with short-term volunteer opportunities, which could lead to a longer term commitment.
- Design meaningful volunteer projects or assignments that have the potential to attract the kind of volunteer you want. People enjoy having choices, so be sure to have a variety of opportunities available. Be specific about the tasks you have available and the time commitment needed. To take the guesswork out of decision-making, list the skills needed for the tasks to be completed.
- Interview potential volunteers to assure a match for your project/organization.
- Brainstorm where to look for volunteers based upon the skill sets that you need.
- Set a goal of a certain number of outreach efforts each month or quarter. Be sure to have materials that you can leave behind if recruiting at public meetings, schools, etc.
- The direct ask is always the best approach when you want someone to volunteer for you.

Additional Tips to Keep in Mind:

- Use vocabulary appropriate to the citizens that you are trying to recruit. Perhaps "community service" is a better term than "joining in". Advertise what you need, using volunteers as a descriptor. For example, if you need a photographer to judge a contest, be specific.
- Don't minimize the job of the volunteer—most people enjoy being challenged and like to think that they are contributing to the greater good.
- Respect a volunteer's time—don't invite 25 to work on a trail when there is only work for 10.
- Avoid too many meetings—many volunteers are happy to give their time to a project or event, but prefer not to attend meetings.
- Put volunteer opportunities on website or in your brochure. Have a recruitment list at special events.

Where to Recruit

- Newsletters
- Articles in local newspaper
- Brochures at park
- Trade shows or exhibits
- Local schools and universities
- Community meetings and groups
- Environmental or special interest groups

- Regional volunteer centers or organizations
- Strategic partnerships
- Volunteer Search websites
- Referrals
- Special events

Follow up with any potential recruits gained through the above methods.

Managing Volunteers

Once volunteers are recruited, they then need to be managed. It works best to have someone in charge of recruiting, scheduling, and motivating volunteers. This could be done through a volunteer coordinator or an outreach committee of the board.

- A volunteer coordinator tends to be a single individual whose primary responsibility is managing other volunteers (recruitment is still a team task). The volunteer coordinator provides a single point of contact for the organization, which facilitates record-keeping. Conversely, this can be a time-consuming position and when the coordinator quits or leaves, a disruption in the flow can become problematic. A volunteer coordinator job description and work plan helps to maintain continuity in the face of changing roles.
- An outreach committee spreads the responsibility for volunteer management among a group of interested individuals. While many hands make light work, too many cooks can spoil the dinner.

All new volunteers should receive an orientation that includes:

- Information on the organization's mission.
- Contact information for chapter contact person.
- Program and event brochure.
- Training for the tasks in which they will be involved—no matter how simple the task!

A buddy system can make a new volunteer feel more welcome and provide them with a contact to direct questions. It also increases a sense of connection with the group.

It is important to correctly match volunteers to assignments. This can be done initially through the volunteer interview, which is similar to a job interview. Next, get to know volunteers' interests and skills by giving them short term assignments. Maintain a continuous feedback loop with the volunteers—keep them apprised of how they are doing, how their work is benefiting the group, ask how they enjoy the work, etc.

Remember: Volunteers have the right to say "NO" to volunteer assignments.

Working with volunteers takes time, energy, and commitment. To get their loyalty, interest, and best effort, volunteers need:

To be heard
A sense of belonging
Fair treatment
A feeling of accomplishment
To be praised
To know what is expected of them

Recognizing Volunteers

To keep volunteers motivated and engaged, a small investment of time and resources in recognition can pay off in big dividends.

Provide refreshments at volunteer tasks and assignments.

Have a special area designated for volunteers where important information can be placed, announcements displayed, etc. This "Volunteer Lounge" creates a sense of belonging to the organization.

Celebrate volunteers' contributions:

- Picnic/cookouts
- Awards/plaques/trophies
- Trinkets: key chains, mugs, water bottle
- Letters for free camping at other parks
- Outings with the ranger/naturalist/special programs
- Volunteer of the month/volunteer of the year
- Party—from formal to informal
- Verbal and handwritten thank you notes
- Providing continuing education opportunities
- Progressive thank you programs—one-year, two-year, etc . or 100-hour, 200-hour, etc.
- Service pins
- Potluck dinners

The Nonprofit Center at LaSalle University (www.lasallenonprofitcenter.org) offers these two helpful checklist reminders:

Ten Mistakes to Avoid When Working with Volunteers

1. Talking more than listening.
2. Asking too much.
3. Asking too little.
4. Asking people to volunteer and then not having anything for them to do; not having job descriptions to define expectations.
5. Failing to recognize changing volunteer needs.
6. Keeping volunteers out of the loop.
7. Passing up volunteers who can only make a short-term commitment.
8. Failing to fire poor volunteers.
9. Failing to promote good volunteers.
10. Not saying thank you!

Ten Things to do When Working with Volunteers

1. Delegate!
2. Focus on Fun!
3. Know what you need volunteers to accomplish.
4. Watch out for too many meetings.

5. Avoid leadership burnout.
6. Start with people you know.
7. Jump start recruiting with a special event.
8. Put someone in charge.
9. Be welcoming to volunteers.
10. Say thank you!

C. Where to Go For More Information

The Nonprofit Center at LaSalle University (www.lasallenonprofitcenter.org)

Australasian Volunteer Program Management (OZVPM) (www.ozvpm.com)

Energize, Inc. (www.energizeinc.com)

Points of Light (www.pointsoflight.org)

Nonprofit Risk Management Center (www.nonprofitrisk.org)

Take Pride in America (www.takepride.gov)

Volunteer Match (www.volunteermatch.com)

XIV. Helpful Forms (Available separately on the Friends Resources page)

A. Professional In-Kind Hours

It is important to keep track of professional in-kind hours. This helps us with insurance, helps you when applying for grants, and gives you an idea of the number of volunteer hours necessary to complete a project. Examples would be heavy equipment operators donating their time, a graphic artist doing the layout of a publication pro bono, etc.

B. Volunteer Sign-in Sheet

It is important to keep track of volunteer hours. This helps us with insurance, helps you when applying for grants, and gives you an idea of the number of volunteer hours necessary to complete a project. It allows both the chapter and PPFF to demonstrate the importance of volunteers.

C. Hours Trackers

Use the logs (available as a combined Excel spreadsheet that will do the calculations for you) to guide you in keeping records of chapter activities. This tracker will help you to complete the annual report and provide you with data for grants and public relations.

- Meetings
- Programs
- Volunteer Days