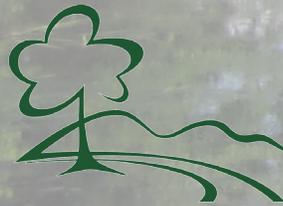


best practices

for state park & historic
site friends groups



PARKS & TRAILS
NEW YORK



NEW YORK
STATE OF
OPPORTUNITY™

**Parks, Recreation
and Historic
Preservation**

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New York State has the oldest park system in the nation. From the 1885 establishment of America’s first state park, Niagara Falls, to the protection of Long Island’s beaches in the twentieth century, New York has been a national leader in conserving its diverse and unique natural and cultural heritage.

Friends organizations have been supporting New York’s state parks and historic sites for nearly a century. The first Friends group in New York State was the Old Fort Niagara Association, founded in 1927, to provide historic interpretation and preserve the artifact collection of the Fort. Today, there are 76 State Parks and Historic Site Friends groups across the state providing critical support and programs to our state parks system.

Friends groups are more important than ever, particularly in light of the surge in parks visitation in recent years, up to 74 million in 2018. Data collected from our 2018 Friends survey indicates these groups raised over \$17 million, hosted 89 programs for the public, and contributed nearly 132,000 hours of volunteer time, all to enhance and support the state park system.

Continuing to build and strengthen Friends groups —and their partnership with the Office of Parks, Recreation and Historic Preservation (OPRHP)—will provide a significant complement to New York State’s ongoing revitalization of its iconic park system and provide more opportunities for park and historic site visitors to engage with and appreciate our natural, cultural and historical treasures.



Humphrey Nature Center at Leitchworth State Park



Higley Flow State Park

In addition to raising funds for capital projects and advocating for their parks and historic sites, Friends groups often take on programmatic and on-the-ground maintenance tasks. They act as docents and lead nature walks, they pick up trash and plant trees, and they work with park and site management to think creatively how to expand programs and public services.

Friends groups accomplish Herculean tasks on shoestring budgets. Although a few organizations are large and well-funded, more than half have budgets of \$10,000 or less. What they lack in funds, they make up for in time, creativity, hard work and commitment.

Friends groups are critical to ensuring the state parks and historic sites we love stay open and have the funding needed to protect, enhance and expand them.

Parks & Trails New York (PTNY) has created this *Best Practices Manual for Friends Groups* as a resource to help build the capacity of Friends groups, expand outreach and communications, and enhance advocacy. If you are involved in a park or historic site Friends group or thinking about starting one, PTNY can help you build and strengthen your organization.

So you want to start a Friends Group

Congratulations! If you're even contemplating starting a Friends group it means that you are thinking about becoming an active steward in your community, and this is the first step! A Friends group allows neighbors and community leaders to actively work on improving parks for everyone. Whether it's an informal group of like-minded folks who get together to plant native flowers and pick up litter, or a more formal group that works on promotional issues, and interpretative programs, Friends Groups can achieve a lot of good works in their communities.

The key to success in whichever direction you want to go is to cultivate a positive working relationship with your State Park or Historic Site management. Make sure you communicate with the

Office of Parks Recreation and Historic Preservation staff at the beginning of this process to ensure your ideas correspond with the facility's goals.

Remember, we are better together, and actively communicating with State Parks staff is a major part in the success of a group's endeavors. We know there are lots of projects you want to get started on - right away! - but making sure your goals coincide with what is needed and achievable is paramount.

Where to Begin?

Think about what you want to achieve. If you're looking to start a sustainable group which meets to work on projects at your park, you're going to need an organizational structure to raise funds and track your successes. We are going to walk you through a series of steps and go through the

entire process of becoming a Friends group. Maybe you're starting from scratch, or maybe you've recently joined an informal group and want to help the group get to the next level. Or maybe you're an established Friends group that wants to re-organize and make sure you're leveraging all the resources available to you. This resource guide may seem intimidating at first glance (are you thinking that there are too many steps?) but this guide has been designed so that wherever you are in the process of

becoming or strengthening a Friends group, you can find the information you need.

Getting Organized

You've talked to your facility manager about your intention to start a Friends group and gotten a positive response. Now what?

- If you discover other people who have been thinking about getting more involved with the park or historic site, now is a good time to pool resources and find out about each other's skill sets.

What are the basic steps in creating a formal Friends Group?

- Organize a core group of people to take ownership and steward the creation of the group.
- Communicate with park staff to create a shared mission and ensure a positive working relationship.
- Create and engage a board of directors for the group.
- Write your mission statement.
- Write your bylaws.
- Register as a non-for-profit corporation.
- Write your master plan.
- Write your first-year goals, making sure they coincide with the vision for your State Park.
- Build and grow your membership.
- Build and grow your volunteer base.
- Engage your community and get the word out about your group.
- Grow your fundraising efforts.
- Track your successes.
- Have fun!



Leitchworth State Park

Examples of strong mission statements from official Friends groups:

Friends of Saratoga Spa State Park

Support and supplement the preservation, management, and public outreach programs at the Spa park by:

- Encouraging and involving the public, members, and user groups to support, provide volunteer services, and utilize the resources of the Park.
- Promoting the historic, cultural, and natural features of the Park through tours, articles, presentations, and volunteer projects.
- Implementing and assisting in the physical improvements at the Park including such activities as flower planting, trail construction and maintenance, and maintenance of the Park tennis facility.

Friends of Caleb Smith State Park Preserve

We are dedicated to the restoration and preservation of the natural environment and historical treasures of the state park preserve for the enjoyment and enlightenment of current and future generations. We accomplish this through activities which support park stewardship and resource conservation, and provide visitors with unique recreational and educational experiences which help foster a higher regard for our natural heritage, and appreciation of our natural and cultural history.

Friends of Higley Flow State Park

The Friends of Higley Flow State Park is a not-for-profit organization formed to:

- Provide a higher level of public awareness, understanding, appreciation and respect for Higley Flow State Park's natural resources and activities.
- Encourage protection, preservation and improvement of Park facilities and natural environment.
- Seek, receive and administer grants, gifts, donations and in kind support for the Friends projects including outdoor interpretive programs, park projects and trail development, and maintenance.
- Provide support of activities for the benefit of the Park through volunteers and membership and encourage public participation in these activities.
- Expand and implement educational programs

- If you are working by yourself to start a Friends group, you'll need to start reaching out in your community to gather support. Here are some ideas to create a team:

- **Host an informational meeting.** You have some great projects you want to take on, so tell people about them. Set a date and time to hold an informational meeting and advertise it by putting up flyers in the community and in the park, posting it on social media and using local message boards.
- **Speak to your State Park contact.** Lots of people visit the park you care about and you might be surprised to find out that there are other people who have expressed interest in creating a Friends group. The facility manager may have some good leads and can help identify people who would like to meet. Keep in mind that although your facility manager is a great resource for ideas, OPRHP staff should not serve on the board of directors.
- **Network.** Look to other conservation, environmental and historical organizations in your community. They might be able to offer opportunities through their programs and events to meet like-minded people who would be interested in joining your team. Make sure you think about all the types of people who use the facility. Friends groups work best when they represent the full spectrum of interests in and users of the facility. From fishing groups to birders, hikers, nature lovers and historians, there are already so many potential Friends group members in your community.

Writing a Mission Statement as a Group

Now that you've gathered a team and you're on the same page about forming a Friends group, you need to write a mission statement. Think of your mission statement as your overarching guide to what you want to achieve. A strong mission statement is important to drive needed support. It will help the group attract members, volunteers and donors. It is also necessary to become an official Friends group with the Office of Parks, Recreation and Historic Preservation. It is extremely important that your mission statement supports the park or historic site's vision, interpretive policy or master plan. Working closely with your facility manager and regional director is the key to success for moving forward together.

Becoming an Incorporated Friends Group

To become an officially recognized Friends group by OPRHP, your group will have to take certain steps and meet certain requirements. The ultimate goal is to have a signed Memorandum of Agreement (MOA) with OPRHP. Although it might seem daunting at first, it is very doable and there are resources available to help you each step of the way.

STEP 1: Obtain a Certificate of Incorporation

To file for a Certificate of Incorporation, you must fill out [New York Department of State \(DOS\) form 1511](#)¹

[HERE](#)² is the official instruction document on how to fill out DOS form 1511.

Pick a name. The first question on this form asks for the name you would like to give your organization. DOS will reject any name

STEPS TO BECOME A FRIENDS GROUP:

STEP 1: File with the NYS Department of State for a certificate of Incorporation by filling out [form 1511](#)⁴.

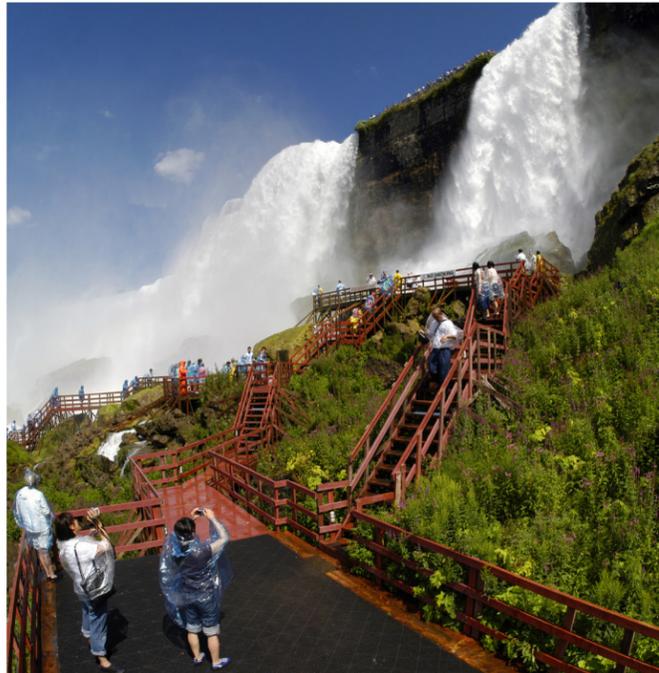
STEP 2: Formalize organizational structure and approve bylaws.

STEP 3: Register with the [New York Attorney General](#)⁵ by filling out the form CHAR 410 OR [CHAR 500](#)⁶.

STEP 4: Obtain an employer identification number (EIN) from the IRS by filling out an [online application](#)⁷.

STEP 5: Apply for Tax Exempt Status with the IRS by filling out [form 1023](#)⁸ (OPTIONAL).

STEP 6: Apply for a Memorandum of Agreement with the Office of Parks, Recreation and Historical Preservation.



Niagara Falls State Park

that is 'indistinguishable' from an entity that is already on file within the state. To be sure that the corporate name you choose is available for use, contact the DOS Division of Corporations in writing and inquire about the availability of the name(s) you want to use. Enclose a check or money order for \$5.00 payable to the Department of State or [Credit Card Authorization Form](#)³ and send the request to: **New York State Department of State, Division of Corporations, One Commerce Plaza, 99 Washington Street, Albany, NY 12231-0001**. The written inquiry should state that you wish to determine the availability of a name and list the name or names to

be searched. Please note that in New York the name of a nonprofit must contain one of the following words (unless an exemption applies): "Incorporated," "Corporation," or "Limited," or one of the following abbreviations: "Inc.," "Corp.," or "Ltd."

State your purpose. Friends groups are considered charitable organizations (charitable, defined in the Not-For-Profit Corporation Law, as "charitable, educational, religious, scientific, literary, cultural or for the prevention of cruelty to children or animals.") and will need to be stated as such on your form. You are basically answering the question, "Why are you forming a Friends group?"

Get your mission statement fine-tuned and ready. You will need it to file form 1511.

Your core group is vital to filling out form 1511. You will need a minimum of three people who have agreed to be corporate officers or members of your group's board of directors. *Remember, Park staff should not serve on your board of directors.*

A filing fee of \$75 needs to be included with form 1511. Your completed form and check or money order should be sent to: **Department of State, Division of Corporations, State Records and Uniform Commercial Code, One Commerce Plaza, 99 Washington Avenue, Albany, NY 12231**.

While you don't need to file for tax-exempt 501 (c) (3) status with the Internal Revenue Service at the same time you file for incorporation, if you are planning on eventually filing for tax-exempt status it's a good idea to include certain additional language in your statement of purpose for incorporation that meets IRS requirements. This includes stating that your group will not engage in prohibited political or legislative

activity and including a dissolution provision that would dedicate your assets to another 501(c) (3) organization if your organization dissolves. For more information on IRS requirements for tax exemption, including sample language, see [IRS Publication 557, Tax-Exempt Status for Your Organization](#)⁹, available on the [IRS website](#)¹⁰. Make sure you include both the required state and federal tax-exempt language in the articles of incorporation you create.

[HERE](#)¹¹ are the IRS guidelines on language to include to secure 501(c)(3) status.

STEP 2: Obtain an EIN number from the IRS.

Your Employer Identification Number (EIN) is your group's unique identification for the IRS. Even if your Friends group will not have paid employees, every organization is required to have an EIN. In fact, you will not be able to file for tax-exempt status from the IRS without an EIN.

To obtain an EIN you will need to fill out and file the [IRS form SS-4](#)¹². Here are the [official instructions](#)¹³ on how to fill out the form.



Chittenango Falls State Park

Please note that the IRS cautions against requesting an EIN before your group is legally formed (has filed and received incorporation approval from DOS). Furthermore, nearly all organizations are subject to automatic revocation of their tax-exempt status if they fail to file a required return or notice for three consecutive years. When you apply for an EIN, the IRS presumes you're legally formed and the clock starts running on this three-year period.

[Here is the on-line EIN application](#)¹⁴

STEP 3: Formalize organizational structure and approve bylaws

You filed for your certificate of incorporation and you were approved. Great! You've filed for your EIN number with the IRS and it has

been granted. Even better! Now is the time to get a few organizational steps completed. It's time to hold a formal board meeting. This meeting must include the initial three corporate officers or board of directors indicated on your certificate of incorporation form. This is a good time to:

- appoint officers
- set up an account year and tax year
- approve initial transactions of your group such as opening a bank account

Make sure to take notes at your board meetings and record decisions. It is important to keep organized records and documents. You should set up a corporate records binder for your Friends group to hold important documents such as articles of incorporation, bylaws,

and minutes of meetings. Information in your corporate records binder will become essential when you're applying for grant opportunities and growing your group.

Most importantly you must draft and **approve bylaws** for your Friends group. Bylaws are both a legal document and a roadmap for your organization's actions. They are a form of agreement or a contract between the corporation and its owners to conduct itself in a certain way. Also, State Parks requires its Friends groups to adopt bylaws prior to entering into a Memorandum of Agreement with the agency. To read an example of bylaws for a Friends group, check out [Friends of Saratoga Spa State Park](#).

STEP 4: Register with the New York State Attorney General's Charities Bureau

When you receive notification from DOS that your request to become incorporated has been granted, you are now obligated to **file yearly** as a charitable organization with the New

York State Attorney General's Office.

Review the online charities registration [user manual](#)¹⁵ for more detail.

YEAR 1: If this is your first time filing as a charitable organization you must register online and fill out form CHAR410 through the [online registration](#)¹⁶. Filing out CHAR 410 requires that you:

1. Have obtained your certificate of incorporation from the DOS
2. Have obtained an EIN from the IRS
3. Have determined official officers within your Friends group since you will need 2 officer signatures to file
4. Have approved bylaws
5. IF you have APPLIED for tax-exempt status (this is optional at this point) attach a copy of your IRS form 1023
6. IF you have RECEIVED your tax-exempt 501(c)(3) status from the IRS attach a copy of your determination letter (this is optional at this point)

YEAR 2 AND BEYOND: From here on out you will file form CHAR 500 with the NYS

Attorney General's office on a yearly basis.

STEP 5: File for tax-exempt status with the IRS

Filing with the IRS can be a complicated process and it is advised that your group obtain legal counsel to facilitate the process. Becoming an official 501(c)(3) with the IRS gives your group tax-exempt status and will ultimately provide your group certain financial benefits.

State Parks may enter into an agreement with an incorporated not-for-profit corporation PRIOR to it receiving its 501(c)(3) status from the IRS. When your group is ready to take this next step of applying for tax-exempt status with the IRS, grant funding is available through the [Park and Trail Partnership Grant Program](#)¹⁷ to help offset the expense of this endeavor. Below is a basic outline of the process to file for tax-exempt status, but please keep in mind it is a large time commitment and is best done under legal counsel to ensure proper filing.

To obtain tax-exempt 501(c)(3) status from the IRS your group needs to be incorporated, have an EIN, have formalized its organizational structure and approved bylaws. To start the process your Friends group will need to fill out the [IRS form 1023](#)¹⁸. The IRS provides [instructions for filling out form 1023](#)¹⁹.

The IRS allows some smaller nonprofits



Mine Kill State Park



Rock Island Lighthouse State Park

to file a simpler form, [Form 1023-EZ](#)²⁰, Streamlined Application for Recognition of Exemption under Section 501(c)(3) of the Internal Revenue Code. This is a much simpler, shorter form that is filed online. Only smaller nonprofits--those with projected annual gross receipts of less than \$50,000 and total assets of less than \$250,000--are eligible to use the streamlined 1023-EZ application.

STEP 6: Requesting to enter into a Memorandum of Agreement (MOA) with OPRHP

State Parks Regional Directors and individual Facility Managers are essential participants in formalizing Friends groups' affiliation agreement.

Interested groups should submit a written request to enter into a Memorandum of Agreement with State Parks to the Facility Manager and/or Regional Director. As part of this application, the Friends group should also provide the required documentation as set forth in the list below:

- Articles of incorporation and any certificates of amendment

- Mission statement
- Bylaws
- Internal Revenue Service Determination Letter
- Code of Ethics/Conflict of Interest Policy
- Financial and/or Accounting Policy or Procedures
- Most recent IRS 990 annual filing with all attachments (If this is a new Friends group they may not have this filing)
- For Not-for-Profits, the most recent

NYS CHAR500 annual filing with all attachments (If this is a new friends group they may not have this filing.) For education Corporations, the most recent Annual Report filed with the Commissioner of Education.

- Sexual Harassment Prevention and Anti-Discrimination Policies
- In certain circumstances, Friends are required to obtain Commercial General Liability insurance naming NYS and OPRHP as an additional insured and to provide proof of such insurance.

Please use this list as a guide for all the materials you need to gather in order to apply for your group's MOA. In our Board Development Section, we will go over tasks such as developing a code of ethics, conflict of interest policy and financial/accounting procedures.



Riverbank State Park

Introduction

Developing an active and effective board is more of a process than a single event. It takes time, dedication and sustained attention to have a productive board that is in good communication with and works hand-in-hand with state park management to achieve agency priorities and establish common goals. Board members must be willing to work with their colleagues and agency staff.

Many tools are available to guide you in developing your board. Why are there so many resources? Simply put, the health and effectiveness of your board is vital to the success of your Friends group. Not to mention that board members have fiscal and legal responsibilities on behalf of your organization. Although the basics are here, it's advisable to check out some of the other available resources and



Midway State Park

to seek out information pertinent to your particular situation. Remember, board development is an ongoing process!

Who's who on your board

Your board of directors assumes the responsibility for following the bylaws and ensuring that the Friends group fulfills its mission. This might sound like a daunting task, which is why it's vital to select good board members, delegate roles and divide up responsibilities.

Overall, board members should care about the success of the group, be loyal in their actions, and willing to work within the organization's bylaws.

One way to vet potential board members is to treat the process like applying for a job. With your core team, draw up job descriptions for different board roles and

then interview potential candidates. Encourage your interviewees to ask lots of questions, speak with other core members and carefully evaluate the time they are willing to commit.

[The New York Council of Non Profits \(NYCON\)](#)¹ is an excellent resource for sample board job descriptions, roles and responsibilities, as well as other key nonprofit-related policies and templates. See [NYCON's board development resources guide](#)²

Rights and Responsibilities

New York State charitable nonprofit board members' fiduciary responsibilities revolve around three basic duties: the duty of care, the duty of loyalty, and the duty of obedience.

Key points of the Duties of Care, Loyalty, and Obedience are:

- Avoid reasonably foreseeable harm
- Pay attention
- Conduct and document due diligence
- Comply with organizational policies, and state and federal laws
- Make decisions in the best interest of the organization



Winnebago State Park Preserve

Duty of Care - This duty is fulfilled when a board member acts in good faith in all dealings with, and on behalf of, the organization. A board member's actions are measured against the "reasonable person" standard; in other words, how an ordinarily prudent person acts in similar circumstances. Board members should stay informed about activities and finances of the organization and avoid the misuse of assets.

Duty of Loyalty - This duty involves acting in the best interest of the organization at all times. Most board members are familiar with the need to avoid conflicts of interest or self-dealing, which is clearly stated in state law.

Duty of Obedience - A nonprofit has an obligation to operate in a manner that fulfills its stated purpose or

mission as defined in the articles of incorporation, bylaws, application for tax-exempt status, and other governing policies and procedures. Board members have a duty to follow these governing documents and the organizations' compliance with all applicable laws and regulations.

Board Structure

A typical board structure consists of:

Board President or Chair— The president or chair, usually the main liaison with the park/site manager, ensures that bylaws and

standards are upheld, delegates responsibilities to board members and committees, acts as a facilitator at meetings, and helps guide the strategic plan and mission of your group.

Board Vice-President or Chair – has all the powers and functions of the president and often succeeds the board chair, when appropriate.

Secretary – performs and oversees documentation and record keeping of the board.

Treasurer – Oversees all financial activities of the corporation and acts as the



Chimney Bluffs State Park

Ideas for finding new board members and extending your network

- Spend time together brainstorming
- Consider current board members' networks or affiliations
- Explore stakeholders, including members, donors, constituents
- Look to other nonprofits, religious and community groups, educational and government institutions (check ethic laws/restrictions)
- Hold an open house
- Have non-board members serve on select committees (check bylaws)
- Appoint newer board members to board development committee
- Involve experts, those with influence, others in an advisory capacity
- Check with local United Way or volunteer programs
- Try online matching platforms, such as: www.boardnetusa.org

chairperson of the Finance Committee that reviews all financial matters. Assures that all financial matters are managed in an appropriate manner.

A [Board Member Job Description](#)³ that includes terms, meeting times and specific board roles is a useful tool to manage board member expectations.

Board Committees: Formation and Function

Board chairs do a lot of the heavy lifting but they need support from the rest of the board to be effective. Creating board committees

is a good way to ensure this support and spread responsibilities and tasks to all board members. Committees are working teams that tackle specific jobs. Some examples of board committees include an executive committee, events committee, policy committee, nomination or board development committee, and finance committee.

For additional information, check out [this article on board governance and committees](#)⁴.

Self-assessment

Understanding your board's strengths and weaknesses is crucial to maintaining an effective board as it will help you identify what types of new board members to recruit. This [Board Matrix](#)⁵ is helpful in pinpointing what types of new board members would best serve the organization. The matrix assesses various attributes, including:

- Knowledge of and commitment to mission and organization
- Talents, specialized expertise and skills
- Board and leadership experience
- Influence, contacts
- Diversity and representation:
 - Ethnic, racial, religious, age
 - Geographic, political, industry

New Board Recruitment

An active and engaged board is essential for any nonprofit, and even more so for all-volunteer organizations. Yet it is often difficult to identify new board members who can bring much-needed skills, ideas and energy to the organization. Make sure you have completed an evaluation of your current board to help guide you in



Connetquot River State Park Preserve

your recruitment efforts.

A good process to follow is to establish a nominating committee that is specifically focused on board recruitment and will lead the outreach efforts, vet candidates and then present a list of nominees to the board.

Once you've identified prospective board members, you should have a plan on how to reach out to them and know what your "pitch" will be. Will the meeting be in person or over the phones? Do you have material about the organization to send to them? Having a designated nominating committee, or at least a designated board member, follow up with prospects helps ensure consistency.

For more tips check out PTNY's [Friends in Focus](#)

[article](#)⁶ on board recruitment and retention.

Board Succession Plans

Board succession and transition plans are as important as board recruitment. However, in practice it doesn't always work out that way. In addition to setting term limits for your board members, there should also be plans in place to deal with unexpected vacancies and the stepping down of long-term members. If you are looking for some guidance on the topic, look at [this resource](#)⁷ focused on succession planning from the Council of Nonprofits.

Board Conflicts

Pursuant to the Nonprofit Revitalization Act of 2013 and its 2017 amendments NYS registered not-for-profits (NFPs) are required to adopt a conflict of

interest policy that sets forth procedures for disclosing and resolving conflicts regarding "related party transactions" and "key persons". For NYS registered NFPs the conflict of interest policy is required by law to be in writing and duly adopted by the board.

The Conflict of Interest Policy adopted by the board must reflect the minimum standards set forth in [N-PCL Section 715-A](#).⁸

Here are two additional resources on conflict of interest within boards:

- [Council of Nonprofits](#)⁹
- [Blue Avocado](#)¹⁰

Links to Additional Resources

- [NYCON presentation](#)¹¹
- [10 Characteristics of Successful Boards](#)¹²
- [National Council of Nonprofits: Sexual Harassment in the Nonprofit Workplace](#)¹³
- [Sexual Harassment Policy Example](#)¹⁴

Introduction

The [NYS Office of Parks, Recreation and Historic Preservation \(OPRHP\)](#)¹ oversees the state's 186 parks and 36 historic sites. OPRHP staff members at your park, in particular the facility manager, are key partners in your efforts to steward and promote the park or historic site. Regular communication with the facility manager will ensure everyone is on the same page and working toward the same goals.

New Friends groups must meet with their facility manager to ensure the group and the region/facility agree to short term goals and objectives. These goals will be incorporated into your MOA.

A successful relationship between your Friends group and facility manager is essential to the effectiveness of your group. Keep in mind that you and the facility manager have a shared goal, to improve and strengthen your park or site.

Friends groups are able to support a park or site in ways that enhance agency efforts:

- Fundraise for programs and projects

- Obtain grant funding and provide additional volunteer labor
- Help to 'connect' the community to a park and give citizens an active role in its stewardship
- Promote and advocate for the park with decision makers

Communication

As with all relationships, communication is key between Friends groups and OPRHP staff. Friends groups are vital assets, bringing energy, volunteers, and fundraising to facilities. Friends can help plan, coordinate and oversee events and assist with planning of park projects and goals. However, sometimes the priorities of a Friends group can differ from staff priorities so it's important to shape your goals together.

Although Friends groups and agency staff both have the best interests of the park at heart, they occasionally have differences, which can lead to frustration on both sides. A Friends group feels that the facility manager is not supportive or appreciative of its efforts. The park manager feels the Friends group is focusing on



Clemont State Historic Site

its own projects rather than tackling agency priorities. These issues are often due to basic miscommunication. The good news is they are usually resolvable through better communication. If your Friends group has a great new idea for a project or event, discuss it with your facility manager before jumping in with both feet. Below are some tips from Friends groups that have helped to improve their communication and relationship with their managers:

- Have a conversation about what type of communication your facility manager prefers: emails, phone calls, in person meetings
- Invite facility managers to all Friends meetings,

include them on the agenda

- Review your facility's master plan (if one exists) to make sure your plans and ideas are compatible
- Have a dedicated contact (often the board chair) between your Friends group and facility manager
- Get facility manager approval for Friends events and projects
- Put together an annual plan that both sides agree upon
- Involve your facility manager in annual budget discussions

Friends groups and facility managers agree that inviting facility managers to your Friends meetings is the best place to start to improve communications.

Facility managers don't necessarily have to attend every meeting, but providing them with an annual schedule of meetings allows them to get those dates on their calendars. You should also supply them with the meeting agenda and the previous meeting minutes to help keep them aware of Friends group activities.

Feedback from our 2018 survey of Friends groups shows that most groups only meet as needed, with monthly meetings comprising the second most frequent schedule. To ensure a more collaborative relationship with facility managers, we recommend inviting them to all your meetings as a way to stay informed to understand park

or historic site parameters.

Friends group need to understand the agency's long-term vision and priorities for the facility to help guide the group's activities and projects. This is why keeping your facility manager actively engaged is essential.

It can be overwhelming for facility managers to have multiple Friends group members contact them with ideas, projects and suggestions. Having a primary point of contact between the Friends group and a facility manager simplifies communications and ensures your park manager isn't being overloaded with input from the Friends group.



Fair Haven Beach State Park

Tips on improving communications with facility managers and staff:

Tips submitted by Friends groups during the 2017 State Friends Conference

- Agree on a defined mission and vision going forward, share it with partners
- When doing a project, maintain one point person on the Friends side and park side
- Ask how you can help and if you are doing what is needed – don't assume
- Discuss desires beyond one project
- Keep the line of communication open
- Communicate about hard topics, be polite but be honest
- Keep disagreements within the group, don't let visitors know there are challenges being worked through
- Have open communication, ask questions, listen
- Keep working at it until you understand each other

Collaboration

Your Friends group and facility manager need to work together to accomplish the shared goal of improving your park. Collaboration is key, especially when planning events and programs. These events can take a lot of preparation, outreach, promotion and management of volunteers and participants. So making sure your Friends group and facility manager are communicating effectively can ensure a successful event.

The National Parks Conservation Association (NPCA) lists the following

key elements to a successful partnership in its [best practices manual](#)²:

- Have the same mission and goals
- Trust is earned over time
- Both partners must contribute
- Clear and constant communication
- Both partners must be in it for the long haul
- Create a culture of sharing and collaboration
- Mutual respect is key

Links to Additional Resources

- [Eye on the Prize](#)³
- [Effective Communication from NYCON](#)⁴

Introduction

Members are critical to the success of your Friends group; they sustain and help carry out your mission as well as providing volunteer and financial support. An active membership is a vital way of developing commitment amongst your supporters.

Building your Membership

There are some simple steps you can take to build your membership base. Some important questions to keep in mind: Who do you want to reach? What benefits will a member receive? Why should someone join?

Capture Names: At all park or site programming events --trail and beach clean-ups, hikes, birdwatching days-- make sure you have a sign-in sheet to capture potential member information. There is no better time than when

someone is actively engaged with your park to maximize on their interest. After a park event is over, make sure to send out a friendly membership ask. This can be an email or a letter but email saves time and is a great way to link to more information about your Friends group. Also, talk with your park manager about a permanent place to keep a membership/information sign-up sheet. That way, you can collect names and information and send out weekly/monthly asks to people who have expressed an interest in learning more about your Friends group.

Organize a Membership Mailing: If your membership numbers are stagnant sometimes a blanket approach to attracting new members is the way to go. Organizing a USPS Every Door Direct Mail (EDDM) zip code mailing is a way to reach a large amount of



Gantry Plaza State Park

people and is relatively cost effective. EDDM mailings cost less than sending letters by first class mail. Talk to your local post office to see if there are any mail houses in your area that you can speak with about setting up a zip code mailing. Then, design a postcard or flyer which might include:

- An introduction to the Friends group
- A list of upcoming Friends events
- An invitation to an open house or other specific Friends event
- A discounted membership offer with an expiration date
- A discount to an upcoming event

Regardless of the information on the card, the Friends website and logo should be prominent on the mailing and there should be a call to action (e.g., join, donate, volunteer, come to an event). If your budget allows, try a large color postcard (6" x 9" or larger) – this will cost more in postage but will stand out in the mail.

Broaden your Horizons: Your Friends group is part of a broader community. It's worth it to get out and network! Are there other conservation, hiking or

gardening groups in your area? What about the local chamber of commerce?

A few types of organizations and individuals that may be interested in partnering are listed below:

- Local Audubon chapters may be interested in cosponsoring programs, particularly if birders are a user group of your park. People involved with an Audubon chapter are likely to also have an interest in the park and could make good potential board members, members or volunteers.
- Libraries are community centers and are good places to make connections and tap into younger audiences. There is also great potential for hosting joint programs with local libraries. For example, your Friends group could talk about the park or site during a program at the library, or the library could hold readings at the park or site.
- Retired teacher organizations
- Senior citizen centers and programs
- Regional volunteer centers
- Religious and civic organizations: People active in religious and civic organizations are

often service-minded, making these entities a great source of potential volunteers and board members. They also have many connections in the community.

- Applicable departments/clubs at local high schools, colleges and universities. Professors of environmental sciences, environmental clubs and communications departments are great potential sources of board members, volunteers, interns and pro bono services. For example, the Friends could reach out to a professor about having a class work on a project for the Friends – e.g., science or history project, a film about the Friends or the park/site, a marketing campaign

Contact these local organizations and see if they would be interested in hosting your group for a presentation at their next meeting. You can bring along a PowerPoint presentation or give a general talk about your Friends group, programming you put on and what your plans are for the future. Make sure to bring along membership information and sign-up sheets. This is a great way to make new connections and get the

word out about why it's a great idea to become a member of your Friends group.

If there are community events that allow informational tables, sign-up! Put together a display of pictures, informational flyers, and membership information and take the opportunity to speak face to face with the community. You may even want to have an incentive for people to leave their contact information, like hosting a raffle for anyone who signs up, or give out a small takeaway (car decal, sticker, pen, etc.).

Make it Worth Their While:

Becoming a member of any not-for-profit is a great way for people to donate and support a cause. But, with a membership comes the expectation of something mutually beneficial for a supporter. Most supporters of not-for-profits do not want to see their money wasted on items and offers that are not mission based so keep that in mind as you structure your membership level tiers. There are lots of low- to no- cost perks you can add as incentives for people to become members, such as member only

newsletters and updates, discounts on Friends group programs or merchandise, member-only meetings, hikes or informational sessions.

Retaining Members

Your group has conducted lots of outreach at local events, organized a zip code mailing, collected contact information from sign-up sheets. Yet when you analyze your membership it's clear that people do not renew their memberships on a yearly basis. You may be attracting new members but the old ones don't consistently renew. Retaining members is a major issue for many Friends groups.

Members are valuable in the long run because they often become more than just members. Members might become volunteers, serve on your board, or make contributions above and beyond their membership dues. Multi-year members



Knox Farm State Park

see the value in being a part of your Friends group and can become ambassadors. Practically speaking, it's more expensive to attract new members (printing costs, mailing costs, time commitments for speaking engagements and public events) than retain members, who are already informed about your Friends group and have actively given their support. So how do you ensure a high member retention rate?

ASK! People stop renewing their membership for many reasons. But a common reason is simply that people forget! Your Friends group membership may be at the top of your priority list but your membership base needs reminders.

Keeping track of current members who are about to lapse and consistently send out reminders about renewing is critical.

If your membership renews on the same date every



Lake Taghkanic State Park

year (and not a rolling basis) then you should be contacting members before their memberships lapse, during the enrollment period and even after the drive is over. If someone has let their membership lapse, do not take this as an immediate sign that they no longer wish to be part of your group. Nonprofit best practices suggest keeping lapsed members on your renewal mailing list for up to five years. More immediately, sending out a 'win-back' email or mailer is helpful to capture those extra-late stragglers. A win-back message includes language that states that your Friends group misses their support and talks about what was accomplished with their past support.

ASK WHY! Sending out a membership survey is a great way to find out why people chose to join your Friends group in the first place. A free internet survey tool such as Survey Monkey

or Google Forms allows your group to easily and inexpensively reach out to members and learn more about them. Many of your members will probably say that they joined because they simply wanted to support the cause. But take the opportunity to ask more in-depth questions. Do they find value in the benefits you offer? Do they like having access to member-only newsletters? Do they participate in membership hikes or clean-up days? Do they want to get more involved?

With this knowledge you can tailor benefits and programming to retain members. Surveys also let members know that their voices matter. Give your members a way to feel engaged and listened to and you will find that your retention rates improve.

Meet your Members at their Level: Retaining members means learning more about why people

donate. As your Friends group membership grows, it's advisable to segment supporters by their level of contribution. Every group has major donors or "angels" that support the mission at higher-than-average rates. The level at which a donor is considered major depends very much on the organization. Some organizations might consider \$100 donors as major whereas other organizations might not consider someone a major donor unless they contribute \$1,000 or more.

It's worthwhile to give special treatment, either through phone calls or personal notes, to higher donors. If a donor comes in at a high level year after year and then suddenly stops, some individual outreach is in order.

Active stewardship of your members forges stronger relationships which will ultimately compel them to remain a member and supporter of your Friends group.

Say Thank You: Make sure to show your gratitude and appreciation. An initial 'thank you' letter should be sent as soon as a

member joins. Membership appreciation gatherings (could be a special hike, lecture, or a small reception) are another way to make your members feel valued.

Engaging Members

Making sure your members feel engaged and valued is key to retaining them.

Members want to hear from you! Keep your members updated on what your Friends group has planned for each season. E-newsletters, posts on social media, paper newsletters, and direct emails are all great ways to keep in touch with your supporters.

Special Events and Programs:

Membership implies exclusivity. You can offer something as simple as a 'members only' picnics and receptions. Special events just for your members can create buzz and interest for non-members to sign up and be a part of the fun.

Volunteer Days: Oftentimes your members want to actively participate in the stewardship of your park. Make sure to stay in touch with your members and invite them to volunteer days or to participate in special projects.



Golden Hill State Park

Introduction

The majority of Friends groups rely on volunteers to achieve their mission. From running programs and leading hikes, to sending out membership mailings and maintaining trails, there is no shortage of tasks to be completed. But many organizations struggle to attract and retain good volunteers. It's important to have a clear understanding of what exactly volunteer work is and is not when thinking about volunteers. Volunteers are an extension of your Friends group and thus have the same requirements as your group; they cannot do work on State lands that is not

approved by the Agency.

Volunteer work is:

- One component of a nonprofit's effective resource mix
- A way to expand available talents and skills
- Effective if well planned and managed
- Often underutilized and underappreciated

Volunteer work is not:

- Free!!! – It takes time and effort!
- An alternative to adequate paid staff
- Only for fundraising, special events, etc.
- Risky to combine with paid staff
- Harder to control and evaluate than paid staff

Whether you are part of an established Friends group, or organizing a new group, it's important to assess your volunteer management and engagement practices. But what exactly does that mean? Below are some key elements to an effective and successful volunteer program to help your group recruit and retain volunteers.

- Create strategic volunteer roles
- Cultivate and retain volunteers
- Screening and placement
- Support and accountability
- Evaluation, recognition, and acknowledgment
- Ongoing professional development and training
- Policies, infrastructure, and technology
- Organizational commitment to volunteer engagement

Not sure how your group stacks up? Use a simple self-assessment tool, like

the table below, to see what score you and your board members would give yourselves.

Recruiting Volunteers

Now that you have given some thought to and assessed your volunteer program, it's time to start recruiting volunteers.

Make sure to develop the volunteer opportunities that align with your group's mission and values. There are lots of ways to do outreach for volunteers. Below are some of the methods that other Friends groups have successfully implemented.

- Host a general volunteer event or recruit for specific needs
- Create a formal volunteer program
- Use existing events to recruit, e.g. I Love My Park Day

- Create events for specific types of users, e.g. a Trail Ride
- Establish practices that promote the group's desired culture
- Provide tools, resources, and strategies for success
- Consider a Board Committee focused on volunteers

Host a volunteer event

One way to attract volunteers is to host a volunteer recruitment event at your park or site. This can run the gamut from a simple tour of the park and meet and greet with existing volunteers to a more formal reception. The Herkimer Home State Historic Site has a structured volunteer program. They hold a Volunteer Interest Night at which community members can come to the site to learn more about the volunteer program. The event provides information about the program,

recruitment process, and an opportunity for questions and answers. The event is billed as an opportunity to "have fun, meet people and get involved"—the reasons many people volunteer.

Keep the event short, with brief presentations featuring plenty of photos, and have handouts listing the various volunteer opportunities and upcoming schedule of events. End the evening with light refreshments and an opportunity for informal conversations. Have participants wear name tags. Weeknight events tend to have better attendance than weekends. Be sure to invite returning as well as potential volunteers and the broader public.

Outreach for Specific Needs

Oftentimes, Friends groups find that they have a specific need that requires a specific skill set—website

development, graphic design, finance/ accounting, etc. In these cases, posting a "job" announcement is a way to attract people that may be interested in lending their skills, but might prefer volunteering from the comfort of their homes or may not be interested in attending meetings or events.

There are several websites that allow you to advertise volunteer positions for free, including Idealist, serve.gov and volunteermatch.org. Another approach to filling a specific need is to reach out to a local business to explore a partnership.

Engaging Volunteers

Now that you've recruited volunteers, how do you keep them engaged and happy so they stick around? Make sure the volunteers are able to do the types of activities they are interested in.

Some might prefer to do more physical work around the site, while others might prefer to help with outreach and fundraising. A sure way to find out what your volunteers prefer is to ask! Consider using a [volunteer application](#)¹ form for volunteers to fill out that would allow them to indicate what they prefer to do as well as how many hours they are looking to contribute.

Some volunteer opportunities to consider are:

- Docent / Tour Guide
- Retail Assistance
- Special Events
- Park Clean Up
- Education
- Office Assistance
- Other Special Skill Set

Creating a Formal Volunteer Program

Establishing a formal volunteer program can help give structure to your efforts and create a sense of belonging to something meaningful for volunteers. While not everyone is attracted to a formal volunteer program, for those that are it can promote loyalty, steadfastness, allegiance and faithfulness to the goals of the organization. Committed

Creating Strategic Volunteer Roles					
Volunteer roles are designed to address our organization's strategic needs while also making the most of today's volunteer interests, skills and availability.					
Rate how true the following statements are for your organization:	Completely True (4)	Mostly True (3)	Somewhat True (2)	Not at all True (1)	I Don't Know (0)
We regularly assess organizational goals and needs to identify opportunities to engage volunteers in that work.					
We engage volunteers in roles that leverage their skills (such as team leaders, project managers, pro bono consultants, skilled laborers, technology experts, etc.).					
We offer flexible schedules and/or virtual volunteer opportunities.					
We have written position/project descriptions for current and future volunteer opportunities.					
We include volunteers as equal members of teams.					

JFFixler Group: <https://vastrategies.com/tools-and-templates/>



Walkway Over the Hudson

volunteers will be willing to take on more responsibility and might be interested in serving on the board of the Friends. Giving the program an official name can add even more cachè.

Walkway over the Hudson has an impressive and very successful volunteer program, called the [Walkway Ambassador program](#)².

Walkway Ambassadors are the welcoming faces you see when you visit the Walkway Over the Hudson State Historic Park, and are easy to spot in their red vests. They are specially-trained volunteers who enhance visitors' Walkway experience in numerous ways, including creating a welcoming environment on the Walkway, promoting safety,

helping to execute a diverse series of programming, operating the merchandise pavilions, and more.

For more information check out these [7 steps for creating a volunteer program](#)³.

Build upon I Love My Park Day and other events that attract volunteers to your park

I Love My Park Day (ILMPD) is an exciting statewide event to celebrate, improve, and enhance New York's state parks and historic sites and bring visibility to the entire state park system. Thousands of volunteers participate in more than 100 cleanup, improvement, and beautification events the first Saturday of May each year.

By participating in ILMPD, Friends groups tap into an event with statewide publicity and support, including banners and t-shirts for volunteers. Through PTNY's online volunteer registration system, groups can capture new volunteers that may not have heard about the event or your Friends group otherwise.

ILMPD could be used to launch a new regular volunteer effort. The Friends can get people to sign up that day to volunteer for upcoming volunteer work days or to sign up to be a regular volunteer. The idea is to harness the positive energy and enthusiasm of the event and translate it into a more regular program, such as monthly trail cleanup days.

Thanking volunteers

A simple thank you can go a long way, and that applies to your volunteers especially. Volunteer appreciation ideas include sending thank you notes, providing t-shirts or other park merchandise, giving out awards for various types of service, and publicizing volunteers and their accomplishments in a newsletter and social

media posts. Everyone likes to feel like their hard work is appreciated, and these small efforts can really be impactful and ensure your volunteers stay engaged.

Collecting Feedback

To ensure your volunteers are happy and feel appreciated, it's always a good idea to obtain feedback from them. This can be done by having a quick paper questionnaire available for them to fill out at the end of an event they have volunteered at or by emailing them a few questions about their experience post event. Either way you decide to collect the feedback, make sure you keep it short (five questions or less) and simple. Using yes or no questions makes it easy for people to fill out a survey. Then after collecting the feedback, don't forget to review and make any necessary changes to your volunteer program.

Links to additional resources

- [How to recruit volunteers using social media](#)
- [Avoid these sins of recruiting volunteers](#)
- [Volunteer match](#)

Introduction

Donors and members are the lifeblood of your Friends group. They are the folks who come to your programs and donate time and money. The value of retaining your current supporters as well as growing your base is an essential part of sustaining your group.

Don't let the idea of raising money intimidate you! People are often happy to support an organization and a place they connect with and that they feel adds value to their community. If you make sure to balance your monetary asks with programs that keep supporters engaged, you will find that your Friends group grows and flourishes naturally.

Basic Donor Management

Donor management means tracking all contributions (in-kind and monetary) and keeping records of all gifts. With this information you can send out thank you notes for contributions and solicitations for continued support. Keeping track of your donors doesn't have to be complicated and time-consuming.



Nyack Beach State Park

There are lots of ways to capture information about your donors. If you have a membership drive or an appeal for funds, make sure the form that supporters fill out includes basic information such as:

Name
Address
Email address
Phone number
Payment information
Gift amount

If you are soliciting donations online, there are applications that let your supporters fill out a digital form. Or you can ask supporters to print and mail their form in with their contribution.

There are plenty of fancy computer applications and programs that can help

you track your donors. This type of software is called a Donor Management System or Customer Relationship Management (CRM). If you're just starting out or have a limited number of supporters, you may not want to invest in a professional management system. In this case, you can use a Microsoft Excel worksheet or a Microsoft Access spreadsheet. Excel and Access are standard data entry systems. The Microsoft website offers free training videos on all its software and your local library is a great resource for how-to computer assistance, including classes.

Even a simple donor database, if properly set up and kept up-to-date and accurate, can show you who is giving now and can

also point the way to future donors and larger donations from current donors. Here are just a few questions that you can answer with your database:

- What is the largest donation we have received this year, and who gave it?
- Who has given the most often in the last two years?
- Which fundraising appeal resulted in the most number of donors and/or the largest total of donations?
- Who gave \$100 or more during an appeal?
- Which ZIP codes have the most donors?
- What are the ZIP codes of our largest donors?
- How many of our volunteers are also donors, and at what level of giving?



Moreau Lake State Park

Basic to Advanced Donor Management Software

A Donor Management System or CRM is a means of organizing, analyzing, and strategically implementing communication strategies with supporters to maintain and grow those relationships. CRM software is something you must purchase or subscribe to. These databases are more sophisticated than a simple spreadsheet.

CRM's are primarily used with the goal of active stewardship of your donor base. Stewardship is about creating meaningful interactions with supporters that nurture long-term relationships and sustained support over time. Once you grow a base of donors and volunteers, how you engage with them can determine whether or not they continue to support your cause.

A CRM facilitates this process by collecting and organizing information about all your contacts in one place with the ability to reach out to them directly from the software. Knowing contacts' donation histories, for

instance, allows you to easily segment them into groups and formulate a campaign that can be sent to all of them while still keeping it personalized.

There are many CRM companies out there and each offers different packages based on what you need. You have to do your research and weigh the benefits of each. Talk to other nonprofits and see what system they use and how they like it. CRM software can be very expensive so make sure to select a company that fits your specific donor tracking needs. Some of the smaller and less expensive CRM systems are:

- Salsa
- Little Green Light
- Kindful



Jones Beach State Park

- Charityproud

[TechSoup](#)¹ is a great website for purchasing software for nonprofits.

Basic to advanced Finance Software

Why bookkeeping matters

Proper bookkeeping and accounting systems ensure that a nonprofit uses its financial resources according to its mission. They support an organization's goals, maintain its financial health, and ensure compliance with essential statutory requirements. If your Friends group is not tracking donations, income and expenses, it's crucial to get started.

Establishing a board position of 'Treasurer' is an excellent way to ensure

that a designated person is responsible for overseeing and tracking finances. For more information on the role of a treasurer, read [this article](#)².

Bookkeeping software can help keep your records accessible and organized. Microsoft Excel is a basic but effective tool for bookkeeping. Quickbooks is one of the industry standards in bookkeeping and also features a version [tailored only for nonprofits](#)³. If you'd rather not undertake bookkeeping responsibilities, there are many local firms that can be hired (often they will offer non-profit rates) who can create fiscal accountability for a group.

Introduction

Obtaining funding for your Friends group to tackle projects can be a challenging endeavor. Moreover, funding sources such as federal and state grant programs, private foundations, and corporate assistance programs are constantly changing, both in terms of their availability and application requirements. As a Friends group, you have the ability to fundraise for your park or site, which the state agency does not. That is why it's important to always be thinking of ways to raise money for your park.

Based on our 2018 State Friends Survey, we know that over 57% of Friends groups host more than one annual fundraising event. Friends groups raise significant funds through individual donations, programs, grants, special events, corporate sponsorship and gift shop sales.

Friends group fundraising ideas include:

- Membership drive
- Plant sale
- Local business sponsors
- Giving Tuesday
- Crowdfunding

- T-shirt (merchandise)
- Fundraiser
- Board match challenge
- Peer-to-peer fundraising through social media - *harnesses the relationships that your supporters share with friends, families, and coworkers; generates awareness for your nonprofit; and reaches beyond your own circle of influence to attract new donors.*
- Amazon Smile
- Facebook Donations
- Recycle bin donations (*Friends of Chenango Valley State Park raised \$2,400 from their collected recyclables*)

Please note that there is no gambling allowed on state properties and this includes raffles.

Basic Fundraising Legal Requirements

Make sure your organization is properly registered with the Attorney General's Charities Bureau and current in its annual financial filings.

Below are some steps from the Land Trust Alliance's Standards and Practices to ensure groups are conducting fundraising activities in a lawful, ethical and responsible manner,



Olana State Historic Site

which can be applied to Friends groups.

Legal and Ethical Practices

1. Conduct an analysis of state charitable solicitation laws
2. Do not compensate internal or external fundraisers based on a commission or a percentage of the amount raised

Accountability to Donors

1. Provide accurate solicitation materials and other communications to donors and the public
2. Provide timely written acknowledgment of all gifts, including land and conservation easements, in keeping with IRS charitable contribution

substantiation requirements

3. Maintain financial and other systems to document and comply with any donor restrictions on gifts
4. Have a written policy or procedure to ensure donor privacy concerns are honored

For more information on ethical fundraising, read this article by the [National Council of Nonprofits](#)¹

For further information, visit the [NYS Attorney General Charities](#)²

Developing a fundraising plan

A fundraising plan will help you achieve your organization's budget

goals. Based on the results of our 2018 Friends survey only 55% of Friends groups have a fundraising plan. A successful plan will have a number of different strategies to reach your overall goal. Diversification is the key to success so you want to be careful not to become overly dependent upon any single funding source.

The six basic steps to creating a fundraising plan are:

- Develop fundraising goals
- Write your plan down
- Estimate how much it will cost
- Develop a timeline
- Identify funding sources
- Evaluate your progress through the year

For more information, read [Joanne Fritz's full article](#)³.

Setting Goals

If your Friends group doesn't have a fundraising plan, you should at least set some fundraising goals. Setting goals will help your group prioritize and focus your fundraising efforts, and should directly relate to your group's mission and the park's masterplan. All groups are different so there isn't a set list of fundraising goals that will work for every group. Knowing that your group wants to raise a large amount of money can be daunting and overwhelming. As with most large endeavors, sometimes it's best to break it down into smaller, manageable goals. There is an easy acronym to help you tackle your fundraising goal setting – **S.M.A.R.T.**:

- Specific
- Measurable
- Ambitious/Attainable

- Relevant
- Time-Based

Specific - How much do you need to raise and for what specific project or projects? Don't just think of raising more money than last year. People like to give for something specific, like a new trail sign, an educational event for kids, or building a kiosk.

Measurable – In addition to specific, does it have a quantifiable goal to measure your success?

Ambitious/Attainable – Find the middle ground between a challenge and unachievable.

Relevant – the “why.” Donors want to know what impact their gift will have on your organization, park or site. Why will giving to your organization make the donor feel good?

Time-based –Have a time

frame and deadline for the campaign. Having regular meetings or checking in periodically will help everyone stay on track and accountable.

For more information, check out the [full article by Allison Gauss on classy.org](#)⁴

Saying Thank You

It's crucial to thank and cultivate your donors. Nothing is worse than making a donation to an organization and not receiving any acknowledgement. So don't forget to follow up with donors, even for small amounts! Often a thank you can be the difference between a one-time donation and an annual donor. A quick handwritten thank you or a personalized note on a printed letter goes a long way.

Timely gift/membership acknowledgements provide the foundation for the next ask while providing a tax receipt for donors' membership/donation. Thank them for their support and be sure to detail how their gift is making an immediate impact on the work being done. The next time the organization reaches out, donors will

already be aware of the impact and will likely feel positive about receiving such a timely “thank you.” Remember, it's much easier and more efficient to cultivate existing donors than it is to recruit new donors.

Grant Resources

The Park and Trail Partnership Grant (PTPG) is a state grant program that is targeted specifically for Friends groups.

Through these grants, funded through the NYS Environmental Protection Fund, Friends groups have been able to accomplish a range of projects that elevated their groups to the next level and enabled them to better care for their park, trail, historic site or

public land. From hiring staff and developing new membership programs to building trails and creating educational exhibits, PTPG grants have enabled Friends groups to increase their effectiveness, promote outdoor recreation, and enhance the stewardship of their facility.

The program, which launched in 2015, is administered jointly by Parks & Trails New York and OPRHP is designed to:

- Enhance the preservation, stewardship, interpretation, maintenance and promotion of New York State parks, trails, state historic sites and public lands.
- Increase the sustainability, effectiveness, productivity,

and volunteer and fundraising capabilities of not-for-profit organizations that promote, maintain, and support New York State parks, trails, state historic sites and public lands.

- Promote the tourism and economic development benefits of outdoor recreation through the growth and expansion of a connected statewide network of parks, trails, greenways and public lands.

For more information on the [Park and Trail Partnership Grant](#)⁵ go to the PTNY website.

Additional Funding Resources

- [OPRHP Consolidated Funding Application \(CFA\)](#)

- [grants](#)⁶
- [OPRHP grants](#)⁷
- [NYS Canal Corporation Canalway Grant Program](#)⁸
- [Department of State Grant Programs](#)⁹
- [More funding opportunities](#)¹⁰
- [Hudson River Valley National Heritage Area](#)¹¹
- [Hudson River Valley Greenway](#)¹²

Links to Additional Resources

- [National Council of Nonprofits](#)¹³
- [NY Charities Bureau](#)¹⁴
- [Five Fundraising Legal Tips](#)¹⁵
- [15 Creative Ways to Thank Donors](#)¹⁶
- [Jennifer McCrea and the Generosity Network](#)¹⁷
- [Network for Good's Nonprofit Fundraising Blog](#)¹⁸
- [Friends Resource Kit](#)¹⁹



Phillipse Manor Hall State Historic Site



Peebles Island State Park

Introduction

Social networking is an interactive form of communication and engagement through which people can add friends, comment, join groups, create and promote events and have discussions. Although it's a casual form of communication, information should be presented efficiently, clearly, and accurately. Many Friends groups hope to foster better communication amongst agency staff, organizational leadership, volunteers, members and the community. If there are questions about what is appropriate to post concerning events and activities at your facility, make sure you are in communication with your facility manager so that he or she can offer guidance. It is always best to check with your facility manager if you are unsure if your content is appropriate.

General tips for Social Media

- Create guidelines for language and content that will be posted. This helps create consistency and a 'voice' for your social media outlets. Make sure that content is relevant to

your mission statement.

- Update your social media accounts frequently
- Make sure passwords are written down and easily accessible by more than one person
- Encourage the community to submit and post their own pictures and comments
- Utilize tools and features that social media platforms have to offer
- Use 'liking' and 'favoriting' to gauge interest
- Interact with comments and questions on posts
- Lower marketing expenses: A Facebook Page costs \$0, and running ads is relatively inexpensive compared to other traditional media like print
- Build brand loyalty: If your followers see that you're active and responsive, they'll more likely interact with you
- Increase website traffic: Use links in posts to direct traffic back to your website
- Boost Search Engine Optimization (SEO) value: A Facebook page will help your organization's website rank higher on Google

Facebook

If your nonprofit doesn't have a Facebook page yet, here are the basic steps to getting set up and gaining your first followers. The whole process should take less than one hour.

Create Your First Nonprofit Facebook Page

Before you begin, there are a few resources you will need to gather:

- Your organization's logo in digital format (try to find the largest size you have). If you're still working on your nonprofit's logo, check out these [75 nonprofit logos](#)¹, which can give you some ideas.
- A large image you can use as a cover photo (more details later)
- Your organization's contact information, mission, and a short description of what your organization does

Now it's time to start getting followers who will like your page (don't forget to like the page yourself).

Followers who like your Facebook page will see your photos and posts in their Facebook feed whenever you have a new update.

Here are three simple things you can do to get more followers:

1. Use Facebook search to invite your Facebook friends to like the page. This is located on the bottom right of your page. Simply type a friend's name and click "Invite." These friends will receive a notification inviting them to like your page. [Link to non-profit facebook tips](#)²
2. Email your current subscribers and members with a link to your Facebook page and ask them to like it.
3. Add a Facebook link to your website. It's a good idea to place this link where your contact information is located.

Instagram

Instagram is an image-driven, storytelling social media platform. Unlike Facebook and Twitter, Instagram can only be used on a mobile device (you can access Instagram on your computer but you cannot update or post anything new). Instagram is a great way to show off your beautiful park or site and engage with a younger demographic, since 59% of users are between the ages of 18 to 29.

Getting an Instagram Account

When you register an account on Instagram for your Friends group (as opposed to an account for your personal use) you need to sign up for an Instagram for Business account. It's free, and it provides you with several useful tools that you don't get with a personal account, including analytics and a contact button.

Setting Up Your Profile

Your profile is your homepage on Instagram – it's the first thing people see when they find you, so make it stand out. If you have an Instagram for Business account, you can automatically pull your contact information in from your Facebook Business Page, and link the two pages. Set up your Contact button to ensure that Instagram users can tap on it and contact you



directly, either via phone call, email, or find directions to your park or historic site. Instagram is owned by Facebook so you will notice a lot of cross integration.

[Here are 25 tips on using Instagram as a nonprofit](#)³

Instagram is a powerful visual tool. It's quick and easy to post since it's made just for mobile use. It's also easy for people to engage with a post (simply 'double-tap' the screen to like a post). Instagram is a fun way to keep people engaged with your park in a current and seasonal manner. [More ideas and ways to use Instagram](#)⁴.

Twitter

Twitter is an online news and social networking site where people communicate in short messages called tweets. Tweeting is posting short messages for anyone who follows you on Twitter to see. Twitter restricts how many characters you can use

in a single post. This helps keep things scan-friendly; every tweet entry is limited to 280 characters or less. Twitter is a good place to announce events and highlight news stories since it is restricted by how much you can say at once (unlike Facebook and Instagram). Keeping it short and to the point will help you stay within the character limit. You can still add in links for more information.

Here are the [10 best practices for using Twitter as a nonprofit](#)⁵.

Twitter might be intimidating since it comes with its own lingo, "hashtags, @, retweet." These are all simply different functions that can help people find your posts and get your message out. Here is a [basic introduction on how you can use Twitter to its full potential](#)⁶.

e-Newsletters

Bringing your Newsletter into the Digital Age

Newsletters are a great way to keep your supporters informed about your group's activities. Digital newsletters (e-Newsletters) are a cost-effective and relatively easy way to produce newsletters (as opposed to print

newsletters). There are many e-news services out there and some offer nonprofit rates or low-cost options if your email address list is small. Here are a few to check out:

- [Constant Contact](#)⁷
- [MailChimp](#)⁸
- [MyEmma](#)⁹

Building your email address list is key to the success of your e-communications. First and foremost, make sure to collect the email addresses of your members and supporters so you can easily keep in touch. Also collect email addresses at events and have a button on your facebook page or website where people can subscribe to your e-News. An email address is extremely valuable because it provides you with a direct line of access to your supporters and potential supporters. In exchange, subscribers expect content that is valuable, engaging, and relevant.

Why Your Group Needs an e-Newsletter:

- Your e-News is a great place to promote upcoming events and volunteer opportunities.
- An email is easy to share! Just like social media

posts, your eNews is an easy way for your supporters to spread the word about your Friends group. And people are far more receptive to something that's been recommended to them by a friend or family member. [A study on young people](#)¹⁰ (ages 20-35) found that 77% reported "they would trust organizations endorsed by friend or family members."

- Your e-News is a great way for your Friends group to showcase the impact it's having in the community. It's also a way of keeping your supporters feeling like they're an ongoing part of your success.
- Recognizing those that contribute to your nonprofit's success can prove very helpful in establishing long-term relationships. You can use your Friends group e-News as an opportunity to thank those who have contributed in various capacities and provide details on what that support meant to your community. Such small gestures can have a huge impact. Think about creating a 'volunteer spotlight' or a 'donor of the month' feature.
- An e-Newsletter is much

easier to produce and cost-effective than traditional printed materials. You don't have to deal with printing or postage and you can include direct links to your website and social media sites.

Website

Why your Friends group should have a website

Having your own website as a Friends group provides a platform from which you can directly fundraise, announce events, provide background and tell the the story of your group. Many groups choose to use their Facebook page as their 'website,' which is a best practice. Often times websites require a very hands-on approach to manage. Not all Friends groups have the knowledge or experience to maintain a website and often a great website will go defunct if there is no one able to pick up the torch. With Facebook, there is a greater chance that someone on your board or a volunteer will be willing and able to take on the task. If your Friends group is at a point where it feels ready for a website, make sure you have a plan in place for ensuring that the website is maintained and updated by

future members.

These days, there are plenty of ways to build a website with little need of knowing how to do more than 'drag and drop'. Square Space, WordPress, and Wix are all services through which you can set up a very simple website.

Here's what a good website can do for your nonprofit

1. Broaden your reach. In order for your organization to receive donations and fulfill its mission, it needs to be widely known. A strong online presence is a cost-effective and efficient way to create that awareness.
2. Engage new and existing donors. The better your website, the easier it will be to inspire people to give money, attend events, and support your organization.
3. Expand your database of potential donors. A website will capture your visitors' information and create a database of people interested in your cause. This will come in handy when it's time to request donations and fill seats for an event.
4. Build a relationship with potential advocates and

volunteers. Websites play a key role in promoting your organization and cause beyond peer-to-peer referrals. Nonprofit websites are perfect tools for social sharing and brand discovery—allowing your nonprofit access to potential advocates and volunteers.

5. Build a case for on-going, monthly donations. Your website can help tell your story in a visual, contextual and emotional way—helping to win the hearts and minds of potential donors and supporters. Websites can also be used to explain the impact of recurring, monthly gifts. Try up-selling one-time donors to a more committed monthly recurring donation, while outlining the positive impact their monthly gift will have. Provide stories, media and data to build a more powerful narrative—all within your website.

Links to Additional Resources

<https://www.ironpaper.com/webintel/articles/nonprofits-invest-websites/>¹¹

Introduction

One of the best ways to attract visitors to your park and have them engage with your Friends group is through hosting events and program. People are more likely to come to your park for a specific event or program that is focused on a particular theme. Maybe it's an educational program or guided hike or a day to volunteer, like I Love My Park Day. If your Friends group doesn't have much event experience, start small and keep it simple so you don't get overwhelmed. Remember to always have some way to capture the contact information of people who attend as they are your best future members and supporters.

Friends groups are extremely creative when it comes to hosting events! In addition to the more common events, here are some creative events Friends groups have hosted.

- Nature bingo
- Scavenger hunt
- History day
- Book club
- Art show
- Birding event
- Nighttime walk
- 5k run/walk

- Holiday/seasonal themed events
- 1st day hike
- Opt outside (Friday after Thanksgiving)
- Plant identification
- Nature photography
- Lecture series

If you are a new Friends group and/or have new board members who want to start planning events but don't know where to start, talk to your facility manager about pairing up with an experienced interpretive and/or environmental staff member who can help strategize and teach.

I Love My Park Day

I Love My Park Day (ILMPD) is an exciting statewide event that attracts thousands of volunteers from across the state to participate in cleanup, improvement, and beautification projects at New York State parks, historic sites and public lands. This annual event, held the first Saturday in May, improves and protects New York State's environment and contributes to a healthier economy by coordinating thousands of volunteers to join in various site improvement projects at parks and public lands all

"Our state parks are natural treasures that offer extraordinary outdoor recreational opportunities, attract tourists who support local economies and draw people together," Governor Cuomo said. "I encourage New Yorkers to participate in I Love My Park Day to enjoy all our parks have to offer and help us to protect and preserve our system for generations to come."

over the state. Some of these projects include cleaning up parklands and beaches, planting trees and gardens, restoring trail and wildlife habitat, removing invasive species, repairing benches and picnic tables, and overall just sprucing up before the busy season.

In 2012, the first year of ILMPD, 2,000 participants volunteered at 40 State parks and historic sites. By 2019, ILMPD had grown to over 8,000 volunteers completing projects at 140 parks. In total, over the past six years, this annual event has resulted in 930

park improvement projects completed by 34,000 volunteers, contributing 77,350 hours of community service at state parks, historic sites and public lands throughout New York.

ILMPD is organized by PTNY in partnership with OPRHP and local Friends groups, to celebrate and enhance New York's parks.

Participating in I Love My Park Day

If your group hasn't held an event for I Love My Park Day, we strongly encourage you to do so. It's a great way to



Fort Niagara State Park

get lots of people to your park or site and engage them, and lots of resources and assistance are available to ensure you have a great event. In addition, since it's a statewide event, the widespread promotion and press will help attract participants to your event. Starting in February, PTNY begins reaching out to Friends groups to register their ILMPD events, and hosts a webinar that provides the group with more information. PTNY compiles all the submitted event information and creates volunteer registration forms. Volunteer registration typically opens at the end of March.

Why Hold an I Love My Park Day event?

Holding an event that is part of a large statewide volunteer effort helps you reach more people. It provides enhanced visibility to the entire state park system while improving parks and historic sites, bringing in new volunteers and resources, and helping to build new partnerships.

How is it Organized?

PTNY – in partnership with OPRHP and local Friends groups – coordinates the

event on the statewide level, providing outreach, promotion, technical assistance and this how-to [organizer's manual](#)¹ for Friends groups and park staff to use for their individual events. Friends groups and park staff oversee cleanup, improvement and beautification projects, work with volunteers, and reach out to the local community.

Coordination with Your Park or Site Manager

Your park or site manager is an important partner in planning an I Love My Park Day event. Before moving forward, Friends groups should discuss the idea with their managers

If a decision is made to move forward with planning an I Love My Park Day event, Friends groups and park managers are encouraged to work together and maintain regular communication throughout the planning process.

Designating a Coordinator and Organizing Your Team

Like planning any event, it's a good idea to assign one person to be the lead coordinator. Some groups may find sharing the responsibilities among two co-coordinators works



Robert H. Terman State Park

best. The coordinator will be the primary contact for communications with PTNY and the park manager. He or she should be organized and a good taskmaster, able to delegate and track deadlines.

But the coordinator can't do it alone! Your group may want to form an I Love My Park Day team or committee to help divide tasks. The team should meet regularly to ensure planning is on track.

An I Love My Park Day planning committee could serve as an opportunity for your first outreach to the broader community. Individuals who may not yet be members of the Friends group might be willing to serve on an event committee, or it might be

an opportunity to court individuals you are hoping to get involved in the Friends group.

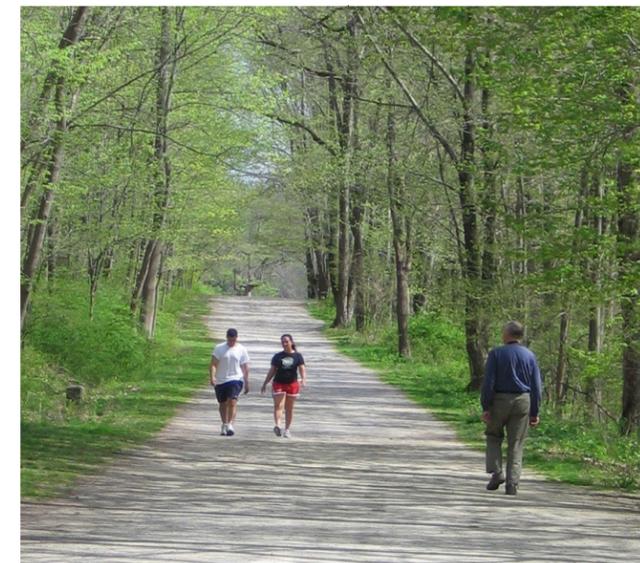
Selecting Volunteer Projects

Start working with your park manager early on to decide on I Love My Park Day projects. Keep the events focused on cleanup, improvement and beautification projects. I Love My Park Day provides an excellent opportunity to engage new volunteers and reinvigorate long-time supporters. Also consider whether the projects would be suitable to volunteers of all ages or if some projects (such as those involving certain tools) might not be suitable for young children or might require adult supervision. I Love My Park Day is a great way to get

youth involved in giving back! Think about what projects will encourage new volunteers to participate and get more involved with your Friends group.

Some ideas for I Love My Park Day projects include:

- Trail maintenance
- Trash and debris cleanup
- Invasive species removal
- Tree or shrub/flower plantings
- Building bird or bat houses
- Weeding and mulching
- Developing a new trail or making a trail ADA compliant
- Applying woodchips to a playground area
- Cleaning up ball fields
- Painting (e.g., fences, exterior of building)
- Completing a simple repair or construction



Franklin D. Roosevelt State Park

project such as a bird blind

- Building new flower boxes or replanting existing flower boxes
- Putting together picnic tables and benches

Below are additional tips based on the experience of previous I Love My Park Day organizers and feedback from volunteer evaluation surveys.

- Consider having a handful of projects that can be completed by volunteers with different skill levels.
- Have a backup project or two in case there are more volunteers than originally anticipated or work is completed early.
- Try to include projects that will have a visible result by the end of the day so volunteers can see what they have



Wellesley Island State Park

accomplished (plus, that makes for great before and after photos).

- Consider whether or not projects are accessible to those with disabilities and how you will communicate event accessibility to the public.
- Many I Love My Park Day participants are looking for meaningful projects that will make a significant contribution to the park or site. These volunteers are also often willing to work more than just a couple of hours and may even be willing to come back to finish a project on another workday.

Once you've assembled your team, designated a coordinator, and selected the projects, you're ready to

begin planning the details of your event and reaching out to the community for volunteers and support. Don't forget to capture the energy and enthusiasm on I Love My Park Day for future events and activities. Some ideas include:

- Having information and a sign-up sheet for another upcoming volunteer workday(s) and encouraging volunteers to sign up right there to come back to the park or historic site. This works really well if you have a project that starts on I Love My Park Day and continues on a second workday (or as many as needed).
- Set up a table with information about your Friends group and assign a Friends representative

to work the table before project work begins, during any breaks, and at the end of the event. Include materials on programs, upcoming events and membership. Have a sign-up sheet for the Friends email list.

- Make note of some particularly enthusiastic new volunteers and following up personally with a phone call.

Volunteer Registration

As a service to local organizers and as a way to boost volunteer numbers, PTNY hosts an online volunteer registration form on its website. That means people are able to visit the PTNY website, find your event on a map, and sign up to volunteer for your event.

The online form includes the official volunteer service agreement required by OPRHP as well as a photo release. Volunteers cannot register to participate unless they agree to both forms. These are the official state agreements, so it works the same as when someone signs the forms in person at the park. This will save time on the day of the event as you do not need to collect these forms from volunteers

who register online. The form also includes a place for a parent/guardian to sign for a minor. Any registrations received by PTNY for your event will be forwarded to the lead organizer of your event. Online registration is typically launched around April 1.

Outreach to Members and Past Volunteers

Your members, along with past volunteers, are the first people to contact when recruiting I Love My Park Day participants. These are the people most likely to participate, so getting as many members to register is important for ensuring a good turnout. Reach out to members using various communications vehicles:

- Include an event ad in your printed newsletter.
- Do a special mailing, like a save-the-date postcard.
- Put information on your website homepage with a link to more information.
- Use social media like blogs, Facebook, Twitter and Instagram to spread the word often.
 - ♦ Use #ILMPD and #LoveNYParks in all your social media posts.
 - ♦ Follow us on Twitter (@NYstateparks and @PTNY) so you can re-

tweet any information we send out, and tag us in your tweets so we see them.

- ♦ When posting photos to Facebook, tag PTNY and State Parks so they show up on our pages as well.
- ♦ When posting photos to Instagram, tag @ParksTrailsNY and @NYstateparks.

Volunteer Follow-up

It's a good idea to follow-up with new volunteers soon after the event. In addition to a thank you sent immediately after the event, solicit their feedback, invite them to the next Friends meeting or volunteer or educational event. Send them a membership or donation solicitation. Contacting new volunteers before too much time has passed will help engage them in your Friends group.

Links to Additional Resources

[Resources for ILMPD organizers](#)²

A Strong and Growing Partnership

Nonprofit Friends organizations have been supporting New York's state parks and historic sites for nearly a century. Continuing to build and strengthen these organizations is vital to the future of the state park system and is integral to the mission of Parks & Trails New York. We designed this manual to provide Friends groups with the tools and resources needed to grow and strengthen their organizations, so that they can have an even greater impact on our state parks.

The partnership between Parks & Trails New York, Friends groups and the Office of Parks, Recreation and Historic Preservation will ensure the continued revitalization of New York's iconic state park system and provide more opportunities for the 74 million annual park and historic site visitors to connect to our natural, cultural and historical treasures.

Parks & Trails New York is New York's leading statewide advocate for parks and trails, dedicated since 1985 to improving our health, economy, and quality of life through the use and enjoyment of green space.

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