Partnership for the National Trails System
2013 Conference - Tucson, AZ

ACTION PLANNING: Basics for Friend-raising and Fundraising

National Park Service
Rivers, Trails and Conservation Assistance Program
Cate Bradley, Ph.D.
Session Take-aways

• Goals
• Roles
• Estimations
• Measurements

Related to strategic or action plans
SOMEBODY
SHOULD
Getting to Goals

I Need to Be Heard

Then We Can Develop an Area of Agreement

Then I Can Listen To YOU
The Emotional Brain

- Neocortex
- Limbic
- Reptilian
Goals represent needs

- Individual values $\approx$ Desired outcomes
- Group agreements $\approx$ Common goals
- Fairness $\approx$ Workload distribution Trust
- Trust $\approx$ Accountability
Establishing a Common Focus

- “vision” represents how things could be if…. ≈ big picture
- “mission” represents specific group commitment ≈ their specific role(s) in the big picture
- “purpose” ≈ clear and measureable goals/actions to reach desired impact
We value trails and trail stories. Our vision is more people using and caring for trails. Our mission is to create and manage a strong trails friends group. Our purpose is to build and grow membership in the trails friends group. Goals spring from these
Goal 1 - establish a BOD

**Task a**
Recruit candidates

**Task b**
Write by-laws

Goal 2 – create outreach plan

**Task a**
Create info materials

**Task b**
Attend community events
Q.

What specific and measurable goal are you aiming for right now? Could you describe it clearly to your uncle at Thanksgiving dinner?
Roles

- Engages everyone in the goals – V, M, P
- Prevent burnout
- Reality check on goals, expectations and ambitions
Clarifying Roles

- establish fairness
- define expectations
- distribute tasks evenly
- capitalize on skills
Q.

What are the roles in a plan?

*Task Leader*

*Task Support Member*

What happens when roles are not clear?

*Stuff falls through the cracks Agreements get broken*
**Task Leader** is responsible for completion of the task

- **Expected role** is to help/coach/prod team members to complete their part of the task – to follow through with what they each committed to do

**Task Support Members**

Clarify what specific role they will play to provide support for each task or goal
Estimate Time

- helps people make **realistic time commitments**
- helps prevent things falling through cracks and tension
- helps prevent burnout
24 x 7 = 168 hours/wk

- sleep
- work
- commuting
- eating
- play/ hobbies
- family
- chores
- community
- devotion
- miscellaneous

= r(extra time)
Work $\approx 20\text{-}60 \text{ hours/wk}$

- time needed for each project or task on your work plan

$= r \ (\text{time for Task Lead or support})$

This helps check available time to projected task deadlines.
Estimate Costs
to help understand the
• magnitude of the goal/task
• budget realities
• low-hanging fruit options
Identify available resources

- existing funds, supplies, tools, etc.
- partnerships
- membership dues
- in-kind contributions
- fee for service
- volunteers

This helps establish the over-all budget of the effort
represent the components and magnitude of the Fundraising Plan

How would you prioritize goals that don’t have available resources?
Guides to evaluate a goal helps prioritize them all

- *How does this relate to Purpose?*
- *Who will benefit? How?*
- *When will the benefit be realized?*
- *Where will the benefit impact?*

Foundations of the V, M, P statements
Structures to Measure Success

• **Inputs** are baseline information (existing data, information and/or conditions - baselines)

• **Actions taken** (what goals and tasks)

• **Outputs** are the **results** of the activities/actions (how did baseline measurements improve)
Example:

**Baseline** – How many communities are located along your NHT?

**Actions** – Inventory how many communities have NHT organizations

**Outputs** – Map of where organization gaps are related to critical communities along NHT
Evaluating Outcomes

• Who is the target audience?

• How will the target audience benefit?

• Does anyone else care that these benefits make a difference?

• How to collect information?

• What reliable resources are available to collect?

• When is the evaluation information needed?
Put it All Together: Action Agenda

• image or graphic of agreements and schedule made by group members

• helps to set priorities based on resources

• helps establish a Budget and Fundraising Plan
7 Elements of the Action Agenda

• Goals and Tasks
• Task Lead
• Support Team Members
• Estimated Time and Costs
• Resources needed (existing and not)
• Critical date due
• Measures of success/evaluation
<table>
<thead>
<tr>
<th>GOAL AND TASKS</th>
<th>TASK LEAD</th>
<th>SUPPORT TEAM MEMBERS</th>
<th>ESTIMATED TIME and ESTIMATED COST</th>
<th>RESOURCE NEEDS/ POTENTIAL FUNDING</th>
<th>CRITICAL DATE DUE</th>
<th>MEASURES OF SUCCESS (evaluation of outcomes)</th>
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<tbody>
<tr>
<td><strong>Goal 1: establish a BOD</strong></td>
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<tr>
<td><strong>Task/objective a</strong></td>
<td>Maria</td>
<td>Kevin, Jorge, Susan, Gail</td>
<td>2-3 hrs each</td>
<td>Desired size of BOD, personal networks and contacts, draft V,M, P statements</td>
<td>1 to 4 months</td>
<td>Commitment for at least 80% of BOD seats by 4th month, accepted V, M, P statements</td>
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<tr>
<td><strong>Task b</strong></td>
<td>Kevin</td>
<td>Jorge, Susan, Maria, Gail</td>
<td>10-15 hrs each</td>
<td>Examples of others, V, M, P statements, legal advice, meeting place, input and review by BOD</td>
<td>By 8th month</td>
<td>Approved final by-laws by 8th month. Articles of Incorporation filed by 10th month</td>
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<td>Goal 2: create outreach plan</td>
<td>Task a</td>
<td>Task b</td>
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<td>Create informational materials</td>
<td>Jorge</td>
<td>Susan</td>
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<td>Attend community fair</td>
<td>Gail, Roger</td>
<td>Gaia, Maria, Roger</td>
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<td>20 hrs each</td>
<td>5 hrs each</td>
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<td>V, M, P statements</td>
<td>By 12th month</td>
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<td>List of BOD members</td>
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<td>Action Agenda for next 12 mos.</td>
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<td>Jan</td>
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<td>Describe organization concept, build support</td>
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<td>Decide on number of BOD members</td>
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<td>Recruit BOD members</td>
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<td>Develop Vision, Mission, Purpose statements</td>
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<td>Write by-laws</td>
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<td>File Articles of Incorporation papers</td>
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<td>Develop Outreach Strategy</td>
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<td>Establish critical partnerships and agreements</td>
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<td>Create information/education materials</td>
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<td>Generate annual budget</td>
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<td>Develop a Fundraising Plan</td>
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<td>Create a Membership Development Plan</td>
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Plan your work and work your plan

Have fun

Call if you need help

www.nps.gov search:
Rivers, Trails and Conservation Assistance Program for your state contact

cate_bradley@nps.gov  520-791-6472