



LASSEN PARK FOUNDATION STRATEGIC PLAN FY20 - FY23

Photo courtesy of the National Park Service



OVERVIEW

The Board of Directors of the Lassen Park Foundation retained Netzel Grigsby Associates, Inc. to prepare and guide a Strategic Plan Retreat to plan for the organization's trajectory over the next three- to- five years. The retreat was held on January 10, 2019 at Courtyard Marriott in Vacaville, California facilitated by Jeanne Schmelzer.

The focus of the retreat was to review the mission, trends in philanthropy, overview of Board survey results, and to identify the organization's top priorities. Priorities were determined through an analysis of the organization's strengths, weaknesses, opportunities and threats (SWOT Analysis), and discussion of the company's past successes and future goals. Task Force members included: Pat Carr, Michael Coogan, Pete Dailey, Steve Jahr, John Koeberer, Bill Latham, John Livernois, Bob Ono, Pam Pitts, Emilyn Sheffield, Debby Trotter, Ben Webster, Art Whitney, Jennifer Finnegan and Marissa Young. Mrs. Schmelzer provided a report from the Strategic Plan Retreat that included suggestions for implementing the priorities based on the discussions from the retreat.

At the February, 2019 Board of Directors Meeting several actions were taken including: acceptance of the five priorities included in the Strategic Plan Report as prepared by Jeanne Schmelzer; an update to the Mission Statement; direction that each committee review the five priorities and set goals for them.

The results of the Board Action and subsequent committee work on goals resulted in the creation of this four-year Strategic Plan to be implemented between Fiscal Year '20 (September 2019 - October 2020) to Fiscal Year '23 (September 2022 - October 2023).

The background of the page is a photograph of a forest campsite. In the foreground, a gravel path leads from the bottom right towards the center. To the left of the path, there are wooden bridges and walkways. In the background, several white tents with yellow awnings are set up among tall evergreen trees. A group of people, including a man in a red shirt and a woman in a white shirt, are walking along the path towards the tents.

MISSION STATEMENT

*The Lassen Park Foundation
provides philanthropic support to
Lassen Volcanic National Park
and invites all, especially youth,
to experience and preserve the
natural and cultural resources of
this special place.*



From conceptual drawing to completion:
Kohm Yah-mah-nee Visitor Center, Lassen Volcanic National Park.



Photos courtesy of the Nation Park Service

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Chairman of the Board
John Koeberer

Executive Director
Jennifer R. Finnegan

S.W.O.T.

.....

The following Strengths, Weaknesses, Opportunities, and Threats were among those identified during the Strategic Plan Retreat in January 2019.

	HELPFUL to achieving the objective	HARMFUL to achieving the objective
INTERNAL ORIGIN (attributes of the organization)	S TRENGTHS <ul style="list-style-type: none">• Volcano Adventure Camp (VAC)• Dinner Auction – Special Event• Executive Staff	W EAKNESSES <ul style="list-style-type: none">• Need to build donor base• Springtime cash flow• Improve board engagement/ Develop clear, consistent messaging
EXTERNAL ORIGIN (attributes of the organization)	O PPORTUNITIES <ul style="list-style-type: none">• Expanding donor base and recurring donors• New Board Members• Endowment Fund	T HREATS <ul style="list-style-type: none">• General lack of awareness of the Foundation - marketing issue• Economic hardships of northern California, redirection of support• Navigating the next 9 months vis-à-vis fire and staffing/leadership

COMMITTEES

The bulk of the work happens at the Committee level through authorization of the Board of Directors.



Reach the Peak

Lassen Peak Trail
Rehabilitation Project
2010-2015

As part of the Strategic Planning process it was identified that the previous committee structure of the Foundation could be consolidated to allow for less meeting times, less staff time, and larger groups contributing to overall project / program effectiveness. The new committees are listed below with their revised definitions:

- **Executive Committee** - General oversight of the Foundation including general management, human resources, meeting logistics and reporting.
- **Development Committee** - Assists and enables board members to solicit and cultivate donors; provides back-up support and planning on fundraising activities; interacts with the Communication Committee greatly when working on fundraising campaigns.
- **Communication Committee** - Provides tools for public relations such as marketing materials and consistent messaging. Creation of all marketing collateral and external communication materials including Lassen News and LassenParkFoundation.org.
- **Finance Committee** - Oversight of all financial matters concerning the organization.
- **Youth & Projects Committee** - Oversight and management of youth-related projects and programs.
- **Event Committee** - Event organizing committee for planning, management, production and evaluation of fundraising & social awareness events.

noun

PRI·OR·I·TY

“A thing that is regarded as more important than others.”

Five Priorities for Lassen Park Foundation were identified through the Strategic Plan Retreat and adopted by the Board of Directors in February, 2019. They are as follows:

- 1. Increase The Donor Base** - Improve ability to support increased financial needs of the Foundation.
- 2. Board Development** - Increase number of engaged and supportive board members.
- 3. Marketing** - Increase awareness of Lassen Park Foundation.
- 4. Meet our Financial Goals** - Develop strategies to ensure that the auction nets \$120,000 income in 2019.
- 5. Capital Projects** – Complete the current capital campaign (Volcano Adventure Camp Phase II) and develop a case for a new Capital Project / Campaign.

The following pages will delve further into each Priority, and list the Goals that have been set by each committee as their intended steps to meet the five Priorities.



PRIORITY 1

Increase Donor Base

Communication Committee

Goal 1.1: Increase newsletter circulation by 500%.

Note - This can include web mailing list sign ups from Foundation web site, and an expansion of email/postal mail distribution list from event sign ups.

Development Committee

Goal 1.2: Review donor base and identify viable donors with a goal of increasing the number of active donors and/or increasing the number of donations per active donor.



PRIORITY 2

Board Development



Event Committee

Goal 2.1: Establish regular social Board events.

Development Committee

Goal 2.2: Assist Current Board Members in the solicitation and cultivation of donors by providing them with tools and training to do so.

Executive Committee

Goal 2.3: Recruit up to 45 Board Members and provide training for new members.

Goal 2.4: Review Strategic Plan goals of the committee at the start of every committee meeting going forward.

PRIORITY 3

Marketing

Communication Committee

Goal 3.1: Increase home web page visitation and guest visit time on foundation web site

Note-To include enhancing the effectiveness of the web site by developing interim measures to improve existing site effectiveness, and developing a redesign proposal for FY2020.

Goal 3.2: Creating opportunities for information sharing via public outreach via presentations, local events, etc.

Note-Can include charitable organization events, information booths, recreational organization events, and Foundation hosted events.

Goal 3.3: Expand social media presence and integrate it with brand and online/offline marketing.

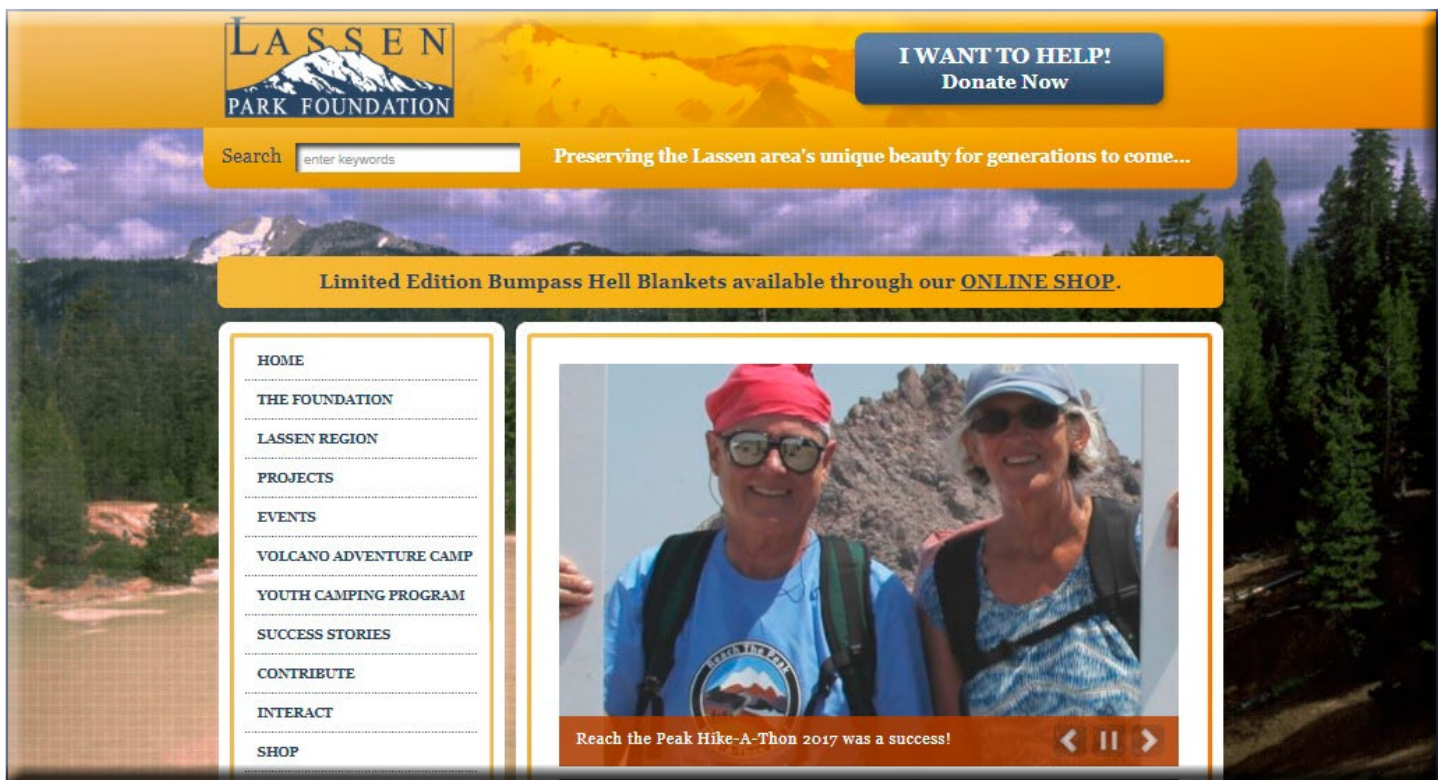
Note-Encourage committee members to contribute 100 word submittals for newsletter or other annual distribution. Solicit/post video and photography provider contributions.

Goal 3.4: Create a Brand Identity Guide that gives a consistent brand image including setting the digital and print standards.

Goal 3.5: Expand material/content (i.e. digital library) that can be used for information sharing and marketing via social media, web, email and print material.

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Continued from pg. 9

Development Committee

Goal 3.6: Provide high level planning (Marketing Plan) to inform the Communication Committee what marketing pieces to develop.

Youth & Projects Committee

Goal 3.7: Acquire 50+ youth camping applicants/grant awardees annually

Event Committee

Goal 3.8: Create a winter version of Hike-A-Thon/Day in the Park (HAT/DITP).

Note-This could include sledding, hot cocoa, or perhaps a snow cat towing people up to Sulphur Works and snowshoe back.

Goal 3.9: Increase Peak Experience Net income to \$150,000 by FY23

Goal 3.10: Build the HAT/DITP event so that the attendance doubles and the Net Income increases to 25,000 by FY23.

Note-This should include increasing sponsorships to \$10,000

Goal 3.11: Day in the Park – Incorporate additional revenue sources such as a small auction.

*Meet Financial Goals***Development Committee**

Goal 4.1: Analyze Direct Mail Appeal results from previous years and determine the ideal frequency of campaigns while maximizing successful donation returns.

Finance Committee

Goal 4.2: Review Financial Statements monthly via e-mail including: P&L monthly, P&L Year to Date, and Cash Flow Statement.

Goal 4.3: Research and if needed institute a line of credit for emergency situations; set requirements to be met when considering activating the line of credit.

Youth & Projects Committee

Goal 4.4: Increase Youth Camping Business Sponsorships by two new sponsors annually.

Goal 4.5: Successfully complete Phase II construction of the Volcano Adventure Camp (VAC).

Executive Committee

Goal 4.6: Board Giving Policy reviewed and updated as necessary, and consider in-kind Auction Solicitations as a separate requirement.

Note: There was considerable discussion regarding the Give or Get Policy and whether the auction items should count toward the \$2,000 annual requirement or if there should be an additional requirement for auction items. Suggestions included requiring each board member to donate a high-end live auction item; to not include in-kind items as part of the Give or Get number; to increase the value of points given for services or work donated to the Foundation.

Goal 4.7: Oversee Grant Writing with a goal of earning \$100,000 a year (not including Capital Projects).

Goal 4.8: Provide strategic oversight to the Development Committee regarding targets and tracking of the Endowment & Investment Funds.



PRIORITY 5

Capital Projects



Photo courtesy of the Nation Park Service

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Lassen Crossroads Informational Center (above) was the first major Capital Project Lassen Park Foundation completed.

.....
Lassen Peak Trail Rehabilitation (below) was a monumental, five year funding and construction project.

Development Committee

Goal 5.1: Support capital projects with fundraising campaigns as appropriate based on joint direction by Lassen Park Foundation Board of Directors & Lassen Volcanic National Park.

Youth & Projects Committee

Goal 5.2: Complete construction on Phase II of the VAC.

Executive Committee

Goal 5.3: Identify the next major capital project in cooperation with Lassen Volcanic National Park.



Photos courtesy of the Nation Park Service



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NEXT STEPS

ANNUAL PROCESS

Lassen Park Foundation adopted this Strategic Plan on _____.

Beginning October 2019, each committee will set proper objectives (see explanation below) annually for the Goals they have adopted. The committees will review their goals/objectives at the outset of each committee meeting to remind them of their focus throughout the year.

At the end of each fiscal year the individual committees will analyze their success at meeting their objectives for the year. They will compare the measurable results to the objectives, and determine if the objective should be increased for the next year or if a new objective is needed.

LPF Staff will compile a report showing the results of all committees' analysis of their objectives and present it to the Board at the Annual Board Meeting (October).

PROPER OBJECTIVES

Just what is a “proper” objective? A proper objective should be three things:

- **Meaningful** – must be tied back to the organization’s goals.
- **Reasonable** – openly-negotiated and based on the opinions of the committee members as to what is really reasonable before proceeding.
- **Quantifiable** – must answer what, who, how much (by what amount should the metric change) and when (not open-ended).

