

## **Chapter Planning Worksheet**

Pennsylvania Parks and Forests Foundation

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

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

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

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

### **PROCESS**

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

Tips:

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

**Take a minute and ask yourself a few questions:**

*Why does your chapter exist?*

*How would you like your chapter to be known? For what would you like it to be recognized?*

*What would you like to accomplish over the next year? Three years? Five years?*

### **Resources**

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

### **Strengths and Weaknesses**

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

**Activity:**

Have each member make a list of strengths and weaknesses of the chapter.

Share the lists to create a master list.

Have members list the top five strengths and the top five weaknesses that must be taken into consideration for the planning process.

**Opportunities and Threats**

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

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

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

**Activity:**

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

**A Mission Statement**

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

Example of mission statements:

- *The Friends of Greenwood Furnace State Park exists to keep history alive and promote the educational and recreational programs of the park and surrounding areas.*
- *The Presque Isle Partnership works to protect, preserve and enhance the park—to make it a better place for all users and for all those interested in preserving our natural environment.*
- *The Friends of Ridley Creek State Park work to preserve, protect, restore and enhance the beauty of the park.*

**Designing the Mission Statement**

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

Procedure:

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

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

### **Goals and Strategies**

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

Questions to ask:

*What are our top five goals for year one? Two? Three?*

*What strategies must we use to reach our goals?*

*How do we evaluate our successes and accomplishments?*

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

### **Objectives**

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

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

### **Action Plan**

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

- Develop a membership brochure.

- ❑ Staff four community events to raise awareness about our organizations.
- ❑ Have membership brochures available at all park events.
- ❑ Etc.

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

### **Evaluation**

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

### **Budget**

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

Simple Budget Example:

<i>Chapter Income:</i>		<i>Chapter Expenses</i>	
Membership		Work Projects	
Fundraising events		List:	
A.		Monthly Programs	
B.		Membership	
Grants		Newsletter	
A.		Conference/training	
B.		Contingency	
Donations			
Tag Sales			
<b><i>Total Income</i></b>		Total Expenses	

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