PENNSYLVANIA Parks & Forests FOUNDATION

Chapter Handbook

November 2025

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I. Getting Started – Welcome!

Please allow this first section of the Handbook to be both a welcome and the place to send a new board member/officer when there is a transition in leadership.

The signed Memorandum of Understanding between the Friends (referred to interchangeably as a "chapter of PPFF") and the Foundation, along with the Articles of Association and bylaws of PPFF, are the governing legal documents for the Friends, but here are a few simple guidelines for the operation of a chapter.

All chapters operate under the bylaws of the Pennsylvania Parks and Forests Foundation. The bylaws and other helpful information can be found on the PPFF website at https://paparksandforests.org/friends-groups/friends-resources/. In fact, the Friends Resources page is always a good place to start to look for information.

This Handbook contains policies/requirements and helpful hints on fostering a successful chapter. A checklist of regularly required submissions can be found in the Appendix; a form requiring the Chair of your Chapter to sign (on behalf of the Chapter) that you have (collectively) received and reviewed this updated Handbook. Significant time and care has gone into creating a comprehensive document and we want to encourage you to take some time to become familiar with its contents – and let us know if there is still anything confusing or otherwise concerning.

Obviously, fundraising is of primary concern to the chapters and to the Foundation. Following here are the forms and procedures you need to report and conduct financial transactions. To minimize confusion, only one person (the treasurer) should conduct monetary transactions with the Foundation.

Not included specifically in the Handbook but of special note is the small games of chance policy outlining Pennsylvania's rather complex regulations on raffles and the like.

https://paparksandforests.org/wp-content/uploads/2015/12/REV_small_games_of_chance_2014.pdf

Likewise, please bear in mind that **we require that you contact the PPFF office if you plan to write a grant proposal, solicit funds, etc**. This allows us to be prepared if there are questions, offer guidance, and to track where funds are being solicited to avoid duplication. **All grant contracts must be signed by PPFF staff or board of directors.** A pre-application form is found on the Friends Resources page, and must be sent to the PPFF office at least three weeks prior to the grant deadline. Upon review, you will be given a go/no go status as well as support (if approved) to create a solid proposal.

All requests for donations and solicitations for membership must include the language required by the IRS and the state:

The Friends of __________________ is a chapter of the Pennsylvania Parks & Forests Foundation (PPFF). PPFF is a 501(c)(3) non-profit organization–contributions to which are tax deductible to the fullest extent of the law. The official registration of PPFF may be obtained from the Pennsylvania Department of State by calling toll free within Pennsylvania 1-800-732-0999. Registration does not imply endorsement.

All acknowledgments of contributions must include the language required by the IRS and the state:

The Friends of __________________ is a chapter of the Pennsylvania Parks & Forests Foundation (PPFF). PPFF is a 501(c)(3) non-profit organization–contributions to which are tax deductible to the fullest extent of the law. No goods or services were received in exchange for this contribution. The official registration of PPFF may be *obtained from the Pennsylvania Department of State by calling toll free within Pennsylvania 1-800-732-0999. Registration does not imply endorsement.*

While the website might be the first place you look for information, please know also that the PPFF staff is always available and willing to help you. We are:

- Bernadette Howard, Bookkeeper, bhoward@paparksandforests.org
- Nina Kralick, Office and Online Retail Facilitator, nkralick@paparksandforests.org
- Pam Metzger, Membership and Volunteer Coordinator pmetzger@paparksandforests.org
- Marci Mowery, President, mmowery-ppff@pa.net

Please note that we do a lot of communication through email so we would ask that you make sure the *paparksandforests.org* domain is added as a safe sender in your email provider. This will usually help to keep our messages from going into spam. If you are unable to send or receive emails, please contact us and we will send you paper copies of the chapter monthly and documents that need to be signed.

Before the end of January each year, you will be expected to complete three items—a conflict of interest statement, acceptance of a code of conduct, and an annual chapter report. The forms are found on the Chapter Resources page of the website and while they may look intimidating, they are not that hard. For the report:

- The report tracks your volunteer hours and money raised, your challenges and successes in the previous year, your meeting schedule and known coming events, and your board members. These are great metrics that you can share—they are your bragging rights! They can also be used to leverage funding, impress donors, or to match grants.
- Each board member must EVERY YEAR sign the conflict of interest statement on the website. This form and your listing of the person as an official board member is what triggers your insurance coverage. We all know that "nothing bad will ever happen," but why take the chance that something does and the insurance company denies you coverage because they've never heard of a person who you say is a board member acting on your behalf? (Note: If you have a conflict of interest, simply indicate the conflict on the form and recuse yourself from votes related to that topic. For example, if you are a t-shir vendor and the group sells t-shirts, note on the form that you are a vendor. When voting for t-shirts, refrain from voting.)
- Each person must annually acknowledge acceptance of the PPFF Volunteer Code of Conduct. The Code of Conduct must also be discussed at the first board meeting of the year and recorded in the minutes. The Code of Conduct, required by the insurance company, protects you, the chapter, and those with whom you work. Allegations of violations of the Code of Conduct are taken seriously, as will be reviewed by PPFF and may result in the removal of the volunteer from service under the umbrella of the Foundation.
- The hours are important because they tell the world how hard you work.
- The money raised is important because this figure speaks to how much the parks and forests need your efforts to support the "icing on the cake" that is the basics of park and forest programming. It does NOT have to balance. It is not an audit figure. The figures you enter here are meant to be accurate but not to the penny accurate!
- The report is due before the end of January. Things happen; people can be late. But reports that are not submitted by the deadline puts your chapter in "non-compliant" status. This also puts your group at risk—at risk of losing non-profit coverage and at risk for not having insurance coverage, making you vulnerable in case of an incident or accident. [See Section VI, Chapter Board of

Directors, Paragraph A (General Information) for the specific ramifications of being "non-compliant."]

One of the advantages you have as a PPFF chapter is that you are part of a network of like-minded groups. You have a built-in "panel of experts," people who believe as passionately about their park or forest as you do about yours. Communicate with them. Learn from them.

Likewise, your actions and activities have a direct bearing on their continued success. It's important to remember that the official 501(c)(3) nonprofit status/registration is held in the name of the Pennsylvania Parks and Forests Foundation. Therefore, it is required that wherever there is a "public face" of your chapter you need to identify yourself as a PPFF chapter. **This satisfies all legal and insurance requirements connecting you to the rest of the organization.** It gives you the opportunity to raise money for your park/forest and protects your officers and directors in the unlikely event that something goes wrong.

Therefore, on your website and Facebook pages (e.g., the "About/About Us" sections) you should take care to include language such as: "The Friends of ______ is a chapter of the Pennsylvania Parks & Forests Foundation (PPFF), a registered 501(c)(3) nonprofit corporation."

Use this phrase on brochures, flyers, and signs. Don't give anyone the opportunity to question your legitimate authority to raise money on behalf of the place you work so hard to improve!

We encourage you to consider and include an "element" special to your park or forest as part of your official logo, which PPFF will provide to you. Again, however, the logo must take the approved form as an easily identifiable way to connect you to the organization. Some examples:

Once your logo has been finalized, we will share with you a two- and four-page newsletter template. It is a simple Word document that can be turned into a pdf and emailed to your supporters, or printed and placed in, for example, the park office to let everyone know what activities you have on tap. Some chapters choose to send an electronic newsletter while others do not do a newsletter.

In terms of communications, a monthly *Chapter Monthly* is emailed to all chapter board members each month. The *Monthly* contains valuable information on advocacy alerts, training opportunities, requests for information and assistance, offers of information and assistance, and updates on policies and regulations. The updated required chapter annual report form will be released here first (and is then available on the Resources page of the website). We strive to do a *Monthly* during the first week of each month.

We recommend setting up chapter specific emails to allow seamless communication when transitions occur. Many chapters choose to go with the formula chaptername@gmail.com along with ChairFriendsofX@, etc.

Finally, a little bit about NEON, a word you will hear often during your association with PPFF! The NEON database keeps track of nearly everyone and everything for us and our chapters. Donors to all of us are tracked there, your donors' contact information can be accessed there, and lots of communications are issued from there.

Each chapter can accept contributions on your own website and through ours via a unique "campaign page" (that's NEONspeak). You can install the page's URL on your website and Facebook page and it is already active and working on our website, where you are now a presence on the Friends Group page.

The actual URL is a complicated one; we often turn it into a shortened Bitly link for your ease of use in publishing and sharing the like. The bitly will be forwarded to the first board members when the chapter forms. We can also create a QR code for you to use.

As you will learn in the pages that follow, any donation over $100 that you submit to the PPFF office via Deposit Form will be logged into NEON and is acknowledged by letter from the PPFF office in accordance with IRS rules.

All donations received online are automatically acknowledged by NEON by email to the donor and are separately acknowledged by the PPFF office if the donation is over $100. The chapter chair and treasurer receive a blind cc of the auto email (and anyone else on the board you would like to receive it can be added easily).

You have access to a report of all online and all over $100 mailed donations via a unique passcode-protected URL, available any time. That URL and the passcode are likewise shared with the first board members when the chapter forms.

The PPFF Chapters gather annually for a retreat. They are a lot of fun and everyone always says that they learn something valuable from their fellow chapter leaders. We also host zoom training for officer positions and special skills, while also providing in-person opportunities for training.

II. Financial Policies

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

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

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

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

PPFF financial functions are currently performed by the Foundation office at 704 Lisburn Avenue, Suite 102, Camp Hill, PA 17011. The normal Foundation point of contact is Bernadette Howard at bhoward@paparksandforests.org or 717-236-7644.

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

A. Deposits

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

1. On the deposit form, indicate the account and a deposit id (such as 02-2007 or FORCSP 01-07, etc.).
2. Complete, in detail, the specific information from each check. This is then forwarded to our database and/or, if applicable, used for thank you letters. This information should be the name and address of who the check is from (not to), check number, amount and type of revenue.
3. In the lower right corner of the form is a deposit summary. Fill this out for every deposit, <u>making sure to break out amounts for merchandise that is taxable, non-taxable and the amount of sales tax. Vendor payments go in “Other”.</u>

Send your deposits to PPFF at 704 Lisburn Road, Suite 102, Camp Hill, PA 17011. All checks should be endorsed with the PPFF “For Deposit Only” endorsement stamp that will be provided to the individual responsible for the account. Check with PPFF if you have not received your stamp. <u>NOTE: Checks made payable to “Commonwealth of Pennsylvania;” “Department of Conservation and Natural Resources;” or to the park, forest, or chapter cannot be accepted and will be returned to you.</u>

As noted above, be sure to maintain accurate records for deposit transactions. Deposits should be in the form of checks or money orders made payable to “PA Parks and Forests Foundation” or “PPFF” with the chapter name listed in the memo line. It is important that the checks be made out to the Foundation and not you, as a chapter, as security scanners may reject a check not made out properly. Be sure to add the money order or cashier check on the deposit form and add it in with the other checks for the total.

When making the deposit, double check your math by adding up the physical checks separately from the deposit form to get a total and then add the deposit form, the two totals need to match, and that needs to match the total in the Summary.

CASH deposits will not be accepted. Please convert cash to a money order payable to PPFF. When converting cash, DO NOT deposit it into a personal account—convert it to a money order. Depositing funds into a personal account puts you at risk with the IRS and potentially could be misinterpreted by donors/board members.

All donations and payments for chapter memberships amounting to $100 or more will receive an acknowledgment letter from PPFF. Your donors want to hear from you. We encourage you to acknowledge donations under $100. A template acknowledgement letter may be found on the Friends Resources page of our website at https://paparksandforests.org/friends-groups/friends-resources/#Fundraising-Policies-Forms-and-Acknowledgments. Please note that if the money is generated for an advertisement, merchandise, or vendor space, etc., the payer will not be getting a letter for tax deduction purposes.

If a check is returned by the bank for any reason, the amount of the check and any fees will be deducted from the friends account. You will be charged a $5 fee from PPFF to correct statements. You will be notified of the returned check and may need to follow through with the individual who gave the money to try to get another check issued. PPFF is not responsible for ensuring the replacement of bad checks.

B. Expenses

Purchases: To reduce the amount of "out of pocket" expenses for a chapter, park, or forest, we advise friends/parks/forests to request a quote or invoice for items needed, which can then be submitted to the Foundation following the protocol below. Supplying a quote or invoice not only ensures that the expenses are confirmed by the treasurer and the park/forest manager, it reduces any burden of liability related to the purchase. Additionally, PPFF paying from a quote reduces the responsibility of the volunteer or staff member tracking receipts and reduces the potential for the IRS to construe reimbursements as income.

Check requests must be submitted using the standard PPFF check request form found on our website at https://paparksandforests.org/friends-groups/friends-resources/#Fundraising-Policies-Forms-and-Acknowledgments or available from PPFF. The request must be accompanied by the original invoice or other appropriate documentation such as a musician contract. Checks will be sent to the vendor unless otherwise indicated on the request form. Please allow time for checks to be processed as they must be circulated for two signatures. If special mailing is needed, the cost of the mailing will be billed to the group account. No checks will be written on an account where the transaction would place the account into a deficit situation. Please avoid multiple payees on a single request form.

All check requests must contain documentation for the expense (invoice, contract, etc.) or, in the case of a reimbursement, receipt for the expense. If the expense is for reimbursement, the receipt/invoice must show as PAID, preferably with the method of payment. The cover form must also include an original signature from the park manager or district forester.

Invoices may also be submitted, with signed check request form, by email to Bernadette Howard at bhoward@paparksandforests.org. The original copies should be kept in your file to produce upon request.

Checks should be submitted by Wednesday at 2:00 PM, and every effort is used to mail signed checks on Thursday of the same week, barring holidays and vacations.

If checks are needed in advance for special event, please allow time for the processing such as in the case of a check being needed to pay a musician at an event, we recommend 2-3 weeks to allow for mailing.

C. Sales Tax Reconciliation

For those groups who intend to sell items or run a concession as a means of raising funds, the Foundation must submit monthly sales tax returns and payment to include all the sales by chapters. Please contact PPFF to let us know that you will be conducting sales so we can coordinate the proper reporting to the PA Department of

Revenue. Please check with us if you have a question about the taxable status of a particular item you intend to sell.

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

PPFF has sales receipt books available to groups to help track sales tax. Contact the office if you would like sales receipt books. Please check with PPFF if you need clarification of any sales tax issue. The Sales Tax Checklist outlining taxable and nontaxable items is found on the Chapter Resources page of the website as linked above, as is the Department of Revenue's REV-717, "Retailers' Information" for sales and use tax (among other issues).

If you are doing sales, you must complete an inventory form at the end of each year and in June of each year. Send the inventory to Bernadette at Bhoward@paparksandforests.org. You can find the form at: https://paparksandforests.org/friends-groups/friends-resources/#Fundraising-Policies-Forms-and-Acknowledgments.

D. Solicitation of Funds

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

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

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

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

According to PA Law, fundraisers hired to assist with raising funds must be registered with the PA Bureau of Charitable Organizations. Be sure to check on this and communicate with the PPFF President regarding the hiring of a professional fundraiser. Before hiring any contractor, it is important to have the funds in your account to cover all costs.

E. Account Reports

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

Closing Accounts

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

F. Inventory

Beginning in 2022, Chapters who offer items for sale (apart from firewood and ice) are required to perform a twice-yearly inventory of the merchandise on hand. This became necessary because of the amount of cumulative sales for PPFF and the Chapters reaching the IRS threshold for an additional filing in the annual 990 accounting for sales. The necessary form (which should be submitted before July 31 and January 31 each year) can be found in the Chapter Resources page of the website under Fundraising-Policies, Forms, and Acknowledgments.

G. Gift Cards

The purchase of gift cards to give as gifts to colleagues, departing staff, volunteers, etc. is prohibited. The IRS looks at this as using non-profit funds for private gain. Gift cards for awards may be permitted, but you will need to document who receives the gift card and have the recipient sign a note of receipt. A sample of a payout report that includes space for the recipient's signature can be found in the Appendix.

H. Cash Prizes

If a chapter offers cash or gift cards as prizes as part of an event or competition (race, photo contest), the names and signatures of the winners must be collected and submitted for reimbursement and/or as proof of disbursement. Reimbursement requests without proper verification as described in the previous sentence will not be reimbursed. See a sample of a payout report in the Appendix.

I. Setting Up Credit and Tax Exemption

Friends do not have the legal authority to set up credit at local stores or places of business. If there is a need to establish credit, please reach out to Bernadette so that we can discuss the request. Likewise, setting up tax exempt accounts at regional and national chains needs to be completed by PPFF, as there needs to be only one account assigned to an EIN number, otherwise it can cause confusion or lead to the loss of the use of sales tax exemption.

J. Supporting Friends Group Operational Costs

While PPFF covers the major costs of friends operations (account management with our financial institutions, audits, insurance), it is necessary for us to charge a small fee for financial transactions. To do this, modest fees and interest remain with PPFF as indicated below. Fees will be applied to the friends' group accounts annually at the end of the fiscal year.

Fees

- A new group shall pay to PPFF a one-time affiliation fee of $40. All monies collected by the group shall be maintained and disbursed by PPFF, pursuant to the MOU.
- The following account fees will be effective January 1, 2026, replacing the previous fees set forth on July 1, 2014:
  - $3 per check (up from $2) written
  - $3 per deposit (check deposits or online donations) (up from $2 per deposit)
  - $5 per returned check
- An hourly rate of $30.00 will be charged when an error occurs because of failure to follow established procedures that results in the bookkeeper needing to expend time in excess of normal processing to resolve the error.
- PPFF retains all interest on accounts.

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

K. Questions and Suggestions

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

III. Risk Management

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

A. Defining Risk

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

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

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

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

B. The Role of the Board

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

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

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

They do this by:

- Establishing long-term goals and short-term objectives for the chapter’s program initiatives, board, and volunteers;
- Measuring performance against established goals and objectives;
- Approving an action plan to meet the organization's goals and objectives;
- Monitoring the plan's implementation;
- Ensuring the availability and proper use of funds through active participation in fundraising programs and the development and monitoring of financial management and fundraising policies; and
- Following PPFF financial and other policies.

C. Types of Risk

Injuries to Visitors, Members, Volunteers, and the Public

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

Ways to avoid injury:

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

Damage to Property
Most groups own some property, such as trail care equipment, recreational equipment, or merchandise. The damage or destruction of the nonprofit's property could impair the organization's ability to continue operations. What would the impact of a major property loss be on your organization?

Most property rental agreements assign responsibility for damage to the property to the lessee. A word of caution: many organizations assume that a general liability policy will cover damage to another's property. However, most general liability policies exclude damage to property owned by or in the care, custody, and control of the insured. If you rent equipment, be sure to read the fine print.

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

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

To manage the risks of legal compliance, every organization must research and keep current on the rules, regulations and statutes that apply to its operations. PPFF does this on behalf of the chapters, and will communicate changes through the Chapter Monthly newsletter and through the Friends Resources page of our website. **To protect your board and your chapter, please stay apprised by reading the Chapter Monthly.**

D. Steps in Risk Management

- Look for risks—pull out a piece of paper and make a list of what could go wrong.
- Evaluate your risks—in this step you decide what risks your group can tolerate, which can be reduced and which need special attention. Assess the risks considering your mission.
- Decide how to control your risks—“What will we do?” “How will we pay for it?” Controlling risk normally falls into the following categories:
  - Avoid—do not offer a service you consider too risky.
  - Modify—Change the activity so the chance of harm occurring and the impact of the potential damage are acceptable.
  - Transfer—Shift at least the financial aspect of risk through contract or insurance.
  - Retain—Accept the risk and prepare for the consequences. If you plan to engage in a high-risk activity, you MUST reach out to PPFF in advance. High-risk activities must be ensured against liability to you, your board, and the foundation.

One way to avoid risk is to by knowledgeable of PPFF’s policies and procedures. PPFF’s policies communicate the character and goals of our organization. Procedures are the underpinnings of the operations that offer guidance. Policies and procedures provide the consistency necessary to manage risk and they need to be communicated to all involved.

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

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

E. Where to Go for More Information

Nonprofit Risk Management Center, https://nonprofitrisk.org/

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

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

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

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

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

IV. Guidelines for Working with Elected Officials

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

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

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

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

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

Don't play favorites with elected officials.

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

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

Be proactive and innovative.

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

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

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

V. Elements of a Successful Chapter

Use this form for evaluating the success of your chapter and to better understand where improvements might be made. This is also a great exercise to do before launching into a planning process.

Rate your chapter on a scale from 1 to 10, where 1 is low and 10 is high.

Our Chapter	***1***	***2***	***3***	***4***	***5***	***6***	***7***	***8***	***9***	***10***
Has a clear sense of purpose (mission) with goals and objectives.										
Has a positive attitude, "We CAN make a difference."										
Has a full partnership with our park or forest.										
Has a full partnership with PA Parks & Forests Foundation										
Performs an annual evaluation of its programs										
Regularly and timely completes annual report, inventory, Conflict of Interest Statements, and Code of Conduct										
Has a budget that reflects our goals and objectives										
Performs regular outreach to community and beyond										
Successfully recruits new board members										
Regularly celebrates our accomplishments										
Regularly provides volunteer recognition										
Successfully recruits new leaders										
Offers training and opportunities for our board members and volunteers to gain new knowledge.										
Has fun!										

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

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

VI. Chapter Board of Directors

A. General Information

The Board has the power to conduct, manage, and direct the business and affairs of the chapter, operating within the bylaws and policies of the Pennsylvania Parks and Forests Foundation

The Board will consist of not less than three (3) and not more than fifteen (15) directors with voting rights. In addition, the Board may include not more than five (5) ex officio directors without voting rights. Board members must be over the age of eighteen (18).

The park manager/district forester or his/her designee will serve as ex officio director without voting rights. Honorary or emeritus directors with no voting rights may be elected by the board.

Directors will receive no salary for their services as directors.

Note: The Friends annual reports are essential for the PA Parks and Forests Foundation (PPFF) to be able to summarize and promote the collective value of volunteer activities. More importantly they are necessary for PPFF to provide the accounting, legal and insurance support for each of the Friends groups. In order to protect both the board members of the Friends groups and PPFF, it is critical that every group complies with the reporting requirements. Our insurance carrier requires the code of conduct form along with accurate numbers of volunteers and board members, our auditor requires the sales merchandise inventory to monitor for potential fraud, and our lawyers and insurance companies insist that we have current board membership information and a code of conduct for each board member.

None of this is "make work"!! Recently one of our Friends groups was sued for something they had no knowledge of or involvement in! If we don't have current information on who is on your board and what you are involved in it is impossible for us to provide the necessary support!! And, ultimately, our collective non-profit status could be jeopardized.

All board members must complete an annual Conflict of Interest Statement and sign a Volunteer Code of Conduct, which will be submitted to the PPFF office. Each chapter must also complete an annual report and, if sales are involved, submit an inventory to the Foundation. These items are due by the 30th of January annually and can be found at https://paparksandforests.org/friends-groups/friends-resources/#Annual-Report-Supporting-Documents.

Failure of a chapter to complete a report (and provide an inventory, if applicable), and to submit Conflict of Interest Statements and Codes of Conduct will place the chapter in "non-compliance" as a chapter.

Currently a group in non-compliance cannot apply for a grant or get a small game of chance license.

Beginning in 2026, if your chapter is in non-compliance, the following steps will occur:

The chair will receive an email with a reminder of what needs to be submitted, with a deadline of February 28 to submit the required documents. REMEMBER: not having the documents on file places your chapter not just at risk of being non-compliant, it places your board members personally at risk as they may not be covered under the directors and officers insurance of the Foundation.

If, after the second deadline the outstanding items have not been received, the Chapter's PPFF account will be frozen for check writing. You will be notified, in writing, that this is occurring, and will be given an additional 30 days to complete the forms. Friend groups who do not have their paperwork complete by April 5 risk having their non-profit status suspended by the PPFF board of directors.

Again, non-compliance jeopardizes your chapter and board's insurance and our collective nonprofit status. We are required to provide accurate numbers of volunteers and board members to provide insurance for directors and officers, volunteer insurance, and accident/liability insurance. Again, friend groups HAVE BEEN NAMED IN lawsuits—but because we carry insurance, risk to personal assets is minimized.

It remains PPFF policy that any chapter who is deemed "non-compliant" at any point in a year will not be eligible for grant applications and small games of chance in that calendar year, even if the non-compliance is corrected. They will be eligible in the following year if they remain compliant.

All board members must also be registered as a DCNR Conservation Volunteer. A list of board members must be kept current in the PPFF office for board members to be covered under the directors' and officers' insurance policies provided by PPFF. Not completing these forms puts members personally at risk.

B. Officers

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

Note: The correct terminology for the officers is listed above. Please be sure to use Chair and not President when referring to chapter leadership.

C. Recruiting Board Members

Look for members who:

- Are local to the park or forest, or members who can commit the time to travel to board meetings or participate virtually if they are not local.
- Can give or raise money.
- Have an ability to work well with others and have an ability to follow through on commitments.
- Have time to give and a willingness to give it.
- Have an interest in and enthusiasm for the park or forest, the goals of the chapter, and the mission of DCNR.
- Have a genuine desire to serve and are not self-serving.
- Have good judgment and an open mind.
- Bring skills or talents to the board not already represented on the board.
- Have good community credibility and visibility.
- Represent a diverse cross section of the population utilizing the park or forest.
- Have an ability to listen, analyze, and think clearly.
- Are willing to attend board and committee meetings.
- Are willing to develop skills, if needed, to improve the effectiveness of the board.
- Demonstrate honesty, tolerance, and a commitment to the cause.
- Is willing to complete the Conflict of Interest and the Code of Conduct

D. Keeping Board Members

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

E. The Job of the Board

- Determine the mission and purpose of the chapter, in cooperation with the park or forest staff.
- Provide planning and guidance.
- Ensure adequate resources for the functioning of the chapter.
- Develop and approve the annual budget; ensure proper financial control.
- Enhance chapter’s public standing—articulate the mission, garner support for the chapter and its programs, improve public relations, demonstrate respect for one another and the park/forest management.
- Recruit and orient new board members.
- Adhere to legal and ethical standards of operation.

- Assure that the chapter has enough people to accomplish the goals of the chapter.
- Assure appropriate meeting content and process.
- Adhere to PPFF guidelines—provide reports, etc., in a timely manner.

F. Role of Individual Board Members

- Attend all board and committee meetings to which you are elected.
- Be informed about the chapter's mission, services, policy, and program.
- Review agenda and supporting material prior to meetings.
- Serve on committees.
- Make a personal financial contribution to the organization.
- Inform others about the organization.
- Suggest possible nominees to the board or committees.
- Keep up to date on policies and happenings.
- Assist in carrying out fiduciary responsibilities.
- Follow a simplified version of Robert's Rules of Order at meetings.

G. Board Committee Descriptions

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

Potential Standing Committees	***Their Typical Roles***
Executive	Oversee operations of the board; often acts on behalf of the board during on-demand activities that occur between meetings, and these acts are later presented for full board review.
Finance	Oversees development of the budget; ensures accurate tracking/monitoring/accountability for funds; ensures adequate financial controls; often led by the board treasurer.
Fundraising	Oversees development and implementation of fundraising; identifies and solicits funds from external sources of support.
Marketing	Identify potential markets, their needs, how to meet those needs with products/services/programs, and how to promote the programs

Public Relations	Represents the organization to the community; enhances the organization's image, including communications with the press
Nominating	Identifies strengths and weaknesses of board, coordinates recruitment of new board members, develops board orientation, evaluates nominating process.
Volunteer Recruitment	Develops volunteer descriptions, matches volunteers to tasks, organizes volunteer recognitions, communicates with park/forest staff
Trail	Coordinates trail work in conjunction with park/forest management.
Events	Assists in planning events.

H. Maintaining Healthy Boards

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

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

When new members are recruited, pair them with an existing member to serve as a mentor and offer any necessary training to ensure a good and productive board member. Have an orientation session for new board members.

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

Groups typically develop in five stages, described by Bruce Tuckman's model:

- Forming, where members are polite and unsure;
- Storming, where conflicts and questions arise over roles;
- Norming, where cohesion builds as members agree on norms and rules;
- Performing, where the group works effectively to achieve its goals; and
- Adjourning, where the group disbands after completing its task.

You can dive deeper into the stages of a group at:
https://www.wcupa.edu/coral/tuckmanStagesGroupDelvelopment.aspx

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

Be flexible.

I. Board Communication

Board communication relating to matters of the board must include all members of the board, including the ex-officio members which include your state park or state forest management or appointed park/forest staff. The communication channel must be a channel to which these state employees are permitted to participate. Additionally, board votes, while permissible (and legal) via electronic communication such as email and Zoom, are not permissible via a survey form such as Google Forms or apps such as WhatsApp.

Board communication, as per the Code of Conduct, needs to be courteous and kind.

J. Where to Go for More Information

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

The Free Management Library,. Free Management LibraryAn extensive listing of non-profit topics.

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

If you have conflict, see the Conflict Resolution Training at: https://ppff.online/chapter-conflict-resolution-training

VII. Running Effective Meetings

A. Meeting Preparation

- Choose a meeting date and time that allows adequate time for participants to prepare and understand agenda.
- Establish regular meeting dates.
- Have specific objectives – know what you want to accomplish and share these with participants so that they know what to expect.
- Keep meeting to a manageable size.
- Keep meetings under 90 minutes. If socializing is important, schedule time specifically for that part of the event to allow people to choose to participate.
- Reserve a room that accommodates participants comfortably and with a regulated temperature.
- Meetings are open to board members, not members at large, who are non-voting members of chapters.

B. Running the Meeting

- The chairperson, or meeting leader, needs to know his or her role. The chair can neither be too strong or too weak.
- Start on time.
- Review agenda and make any additions. Assign times for each item and stick to the times.
- Have a mixture of easy to accomplish and more difficult items (if there are any) on agenda.
- If someone had pre-assigned tasks, they should report early in the meeting.
- Stick to the agenda.
- Avoid side conversations.
- Encourage participation.

- Work to keep the meeting at a comfortable pace – not moving too fast or too slow.
- Summarize the discussion and the recommendations at the end of each logical section.
- Have a method of evaluation.
- Keep accurate notes.
- Follow a simplified version of Robert's Rules of Order. (A "cheat sheet" can be found in Friends Resources.)
- Give everyone a voice and an opportunity to be heard. Don't assume that someone who is quiet is in agreement.
- If a meeting is going to be long, have built in breaks.
- Stick to the agenda and end on time.

C. Problem Solving Steps

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

D. After the Meeting

- Send minutes to all board members, designated state park or forest staff, and PPFF in a timely manner.
    - Minutes record the decisions of the meeting and the actions agreed. They provide a record of the meeting and, importantly, they provide a review document for use at the next meeting so that progress can be measured - this makes them a useful disciplining technique as individuals' performance and non-performance of agreed actions is given high visibility.
    - Highlight any commitments made by attendees and action items.
    - Minutes should not be posted to your website or other public facing forum.
- Follow up on items that need attention.
- Put items that need to be revisited on next agenda.

E. Special Notes

In Pennsylvania, virtual meetings and voting by email are permissible. Vote by Google Forms or similar platforms or apps such as WhatsApp are not legally recognized votes.

As noted in the previous section, board communication must include ALL board members, including the ex-officio state park/forest employees who serve on your board. If considering an alternative communication platform, it must be one that state employees may access. As noted above, voting by virtual meeting and email are permissible—other methods are not.

Minutes do not need to contain the name of the person who makes and who second a motion, but the motion does need to be accurately recorded, along with any discussion related to the motion.

Praise! Praise! Praise! (From Fellowship for Intentional Community, The Foundation for Intentional Community - About FIC

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

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

G. Where to Go for More Information

Mind Tools, http://www.mindtools.com/CommSkll/RunningMeetings.htm
Foundation for Intentional Community, The Foundation for Intentional Community - About FIC
Meeting Wizard, https://www.meetingwizard.info/

VIII. Chapter Planning Worksheet

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

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

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

Planning is an important tool for setting goals and building a chapter; it identifies resources and provides direction, and it provides for a way of measuring success. PPFF is happy to assist with chapter planning and budgeting.

A. Process

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

Tips:

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

Take a minute and ask yourself a few questions:

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

B. Resources

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

C. Strengths and Weaknesses

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

Activity – Identifying the Chapter's Strengths and Weaknesses:

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

D. Opportunities and Threats

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

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

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

Activity – Identifying the Chapter's Opportunities and Threats

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

E. A Mission Statement

The answer to the above questions will help you to clarify your chapter's mission. A mission identifies your reason for being and can breathe life into your chapter by providing a focus. When you formed, PPFF assisted with the development of a mission statement, but it is okay to revisit this every few years to see if it still fits.

Mission statements are generally concise, no more than three to four sentences long. Some recommended that the statement should be under 25 words. Board members should be able to state their mission statement from memory.

Examples of mission statements:

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

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

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

Activity - Designing the Mission Statement

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

Procedure:

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

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

F. Goals and Strategies

Goals

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

Questions to ask:

- What are our top five goals for year one? Two? Three?
- What strategies must we use to reach our goals?
- How do we evaluate our successes and accomplishments?
- Do we have the skillsets to reach our goals? If not, how do we recruit others with the needed skillsets?

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.

***Examples of an objective*:**

Increase membership by 10% in one calendar year.

Place an inclusive playground in the picnic area by December 2026.

Host three educational events per calendar year.

G. Action Plan

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

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

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

H. Evaluation

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

I. Budget

Once a plan is in place, a simple budget (example shown) will allow the chapter to determine how much money it needs to raise to reach their goals. Examples of budgets and a video tutorial are available on the chapter resources section of the PPFF website.

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

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

IX. Communications

A. Develop a Communications Plan

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

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

B. Key Questions to Ask When Developing a Communications Plan

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

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

Audience	Method	Message	Notes

The chapter resources page of the PPFF website contains a tutorial from consultant Amy Hill on identifying your target audience. Visit https://paparksandforests.org/friends-groups/friends-resources/#Chapter-Training-Videos-Notes and click on "Identifying Your Target Audience" under *Chapter Training Notes & Video*.

C. Internal Communications

- Create a planning calendar that covers the first three to six months of the year that lists all board meetings, monthly meetings, scheduled trail or other work, annual special events, etc. Circulate it to your board and volunteers, post it on your website, publish it as a flyer or brochure and distribute it to local outlets. Note: Board meetings generally are not open to the public.
- Create an email distribution list and communicate regularly with your group leaders and volunteers who have access to email.
- Create a folder of orientation materials that can be given to new board members including your brochure, contact lists, list of past project, budget, work plan, newsletter and any other information that will help orient them.
- Figure out a way to transfer the group's important papers to incoming chairs. Develop a checklist of items that they are responsible for and should have during their tenure including: chapter handbook, PPFF policies and procedures; copies of minutes; chapter creation paperwork (Articles of Association, MOU, etc.)
- Establish a protocol for communication.
- Identify your communication tools.

D. External Communications

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

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

E. Publicity

Your chapter's programs and activities can reach a much wider audience through intentional, strategic communication. "Publicity" today includes not only traditional media but also social media, community newsletters, online event calendars, podcasts, and influencer collaborations.

Why Communicate Your Message?

Effective outreach helps your chapter:

- Build community support for your mission and projects.
- Strengthen relationships with local officials, educators, health partners, outdoor organizations, and environmental groups.
- Grow membership and invite participation from groups historically underrepresented in the outdoors.
- Recruit volunteers and enhance attendance at programs.

- Demonstrate your impact to current and potential funders, including foundations, businesses, and agencies.
- Educate public officials about local needs and the community benefits of your projects.
- Increase public visibility and remind residents that parks and forests are for *everyone* to enjoy, explore, and care for.

F. Working with the Media

Today's media landscape includes traditional newsrooms **and** a large digital ecosystem: online news outlets, hyperlocal blogs, social media creators, community Facebook groups, newsletters, and podcasts. Your goal is to meet audiences where they already get information.

1. Build and Maintain a Media & Outreach List

Include:

- **Newspapers** – daily, weekly, regional, college, and online-only outlets.
    - Identify reporters covering outdoors, recreation, health/wellness, environment, community news, or human interest.
    - Many local outlets have reduced staff; your story may be published directly from your well-written release.
    - Note event calendar deadlines (often online forms) and submit consistently.
- **Magazines** – local, regional, and statewide.
    - Lead times are still long (2–4 months).
    - Submit profile ideas, strong photos, letters to the editor, and calendar events.
- **Newsletters** – community, school, neighborhood associations, local businesses, chambers of commerce, tourism bureaus, and environmental groups.
- **Broadcast media** – TV, radio, public access channels, and stations with free community event calendars.
- **Digital platforms**
    - Community Facebook groups and Nextdoor.
    - Local influencers, nature communicators, or community storytellers on Instagram, TikTok, and YouTube.
    - Podcasts focused on outdoors, conservation, local history, accessibility, community health, or regional stories.

2. Your Chapter's Social Media & Email

Choose platforms that match volunteer skill sets—quality and consistency matter more than quantity.

- **Be Proactive**
- Don't wait for the media to find you. You can—and should—reach out regularly:
- Share story ideas tied to current events (e.g., invasive species issues, local trail improvements, volunteer spotlights).
- Invite reporters or creators to visit project sites and events.
- Offer to be a resource for background information or expert commentary.

3. Best Practices for Working with Today's Media

- ***Build relationships***
  Get to know editors, reporters, and local digital creators. A quick introduction—"We'd like to be a resource on outdoor recreation, conservation, and community engagement"—goes a long way.
- ***Choose a trained spokesperson***
  Select someone positive, concise, and comfortable with interviews (including short on-camera or phone interviews).
- ***Localize and humanize your story***
  Media outlets want impact. Highlight how your work affects people, neighborhoods, and local issues.
- ***Provide compelling visuals***
  Photos and short video clips dramatically increase coverage—especially online.
  Provide high-resolution images, alt text, and signed photo releases.
- ***Be timely***
  News moves fast. Send your information early and follow up with a quick summary if a reporter misses your event.
- ***Invite the media to events***
  Use a media advisory 5–7 days in advance.
  Provide on-site materials, quotes, and contact information.
- ***Follow up after events***
  Share key outcomes, attendance numbers, quotes, and photos.
  Thank journalists and creators who covered your event.
- ***Use inclusive language***
  Speak to the full community. Avoid assumptions about who uses the outdoors or what "outdoor experience" looks like.
- ***Photos & Visuals***
  - Good visuals significantly increase the chance of publication.
  - Share photos that feature diverse participants and accessible settings when possible.
  - Avoid overly crowded shots; ensure faces are clear (nickel-size rule still applies).
  - Always include: **who, what, when, where, why**, and photographer credit.
  - Keep signed photo releases on file for all identifiable individuals.
  - Provide captions and short alt text for online use.

4. Press Releases, Letters to the Editor & Op-Eds

General Guidance

Whether writing a press release, letter to the editor (LTE), or op-ed:

- **Lead with your key message** – who/what/when/where/why/how in the first paragraph.
- **Write clearly and accessibly** – aim for an eighth-grade reading level.
- **Use accurate data** to support your points.
- **Make it digital-friendly** – expect your text may be used verbatim on websites.

Specific Formats

Press Release Format (Updated)

- Logo and organization name at top
- Release date
- Media contact (email + cell number)
- Clear, concise headline
- City dateline (e.g., *HARRISBURG, PA* —)
- Strong lead paragraph
- Short quote from a spokesperson placed early
- Supporting details in short paragraphs (2–4 sentences max)
- Links to your website, photos, and event details
- Boilerplate with your mission
- End with ###

Media Advisory Format (Updated)

- A media advisory is an invitation, not a full story. Include:
- A simple, descriptive title
- 2–3 sentences describing why the event matters

WHO, WHAT, WHEN, WHERE, WHY in list format

- Accessibility information (parking, trail surface, ADA access)
- Contact person on-site
- Hook and visuals (e.g., ribbon-cutting, volunteer activity, kid-friendly moment)
- Send one week prior; resend the morning of large events

Cautions

Before taking action that may raise concerns, consult PPFF staff.
Remember: as a nonprofit, you **cannot support or endorse political candidates** or take actions that could be interpreted as partisan. Keep messaging strictly tied to issues, education, and public benefit.

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

FOR IMMEDIATE RELEASE
(Date)

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

Headline: Clear, Compelling, and 8–12 Words Maximum

(LOCATION), PA — *Lead paragraph goes here.*
State the **who, what, when, where, why, and how** in the first 2–3 sentences. Assume this may be copied verbatim into online news.

Include a Quote Early

"Insert a short, human-centered quote from a relevant spokesperson," said **[Name, Title]**. "Use the quote to add emotion, community impact, or forward-looking vision."

Supporting Details
Add 1–2 short paragraphs that provide:

- Why the project/event matters to the community
- Impact or background data
- Partners, funders, volunteers, or agencies involved
- Accessibility notes (universal design, community participation, inclusivity)
- Where readers can find more information

Optional Second Quote
Use an additional quote from a partner, elected official (issue-focused, not political), volunteer, or participant.

Event or Program Details

Event Name:
Date & Time:
Location: (with link to Google Maps)
Description: Short 1–2 sentence description of what attendees can expect.
Registration Link: [URL]
Media Assets: Link to photos, graphics, or video folder (Google Drive, Dropbox, etc.)

About Your Group
A few lines about your group. This should be consistent on all press releases and include "Friends of ____, a Chapter of the Pennsylvania Parks and Forests Foundation")

###

Sample Media Advisory Template 2025

[Organization Logo]
Chapter Name, a Chapter of the Pennsylvania Pars and Forests Foundation

MEDIA ADVISORY
Date: [Month Day, Year]

Media Contact:
[Name, Title]
[Email Address]
[Cell Phone Number]
[Website URL]

Headline: What the Event Is (Simple + Clear)

Example: "Volunteers to Restore Trails at [Park] in Community Clean-Up Event"

Reporters, photographers, and digital content creators are invited to cover **[event name]**, where **[brief description of the newsworthy action]**. The event will offer strong visuals and opportunities to speak with volunteers, community partners, and leaders about the local impact of this project.

WHAT:
1–2 sentence summary of the event and why it matters.

WHO:
List notable participants or partners:

- PPFF representatives
- Volunteers
- Local officials (issue-focused, nonpartisan)
- Community organizations
- Families/children (if youth are involved)

WHEN:
[Day of week, Month Day, Year]
[Start–End Time]
[Best media arrival time: optional]

WHERE:
[Exact location + address]
[Google Maps link]
If outdoors, include rain plan or backup location.

VISUALS:
- Volunteers in action
- Ribbon-cutting, planting, cleanup, demonstration
- Youth, families, and diverse participants
- Scenic backdrops
- Hands-on activities

(Reporters increasingly rely on visuals for online and social posts—tell them what they'll get.)

SPOKESPEOPLE AVAILABLE:
- [Name, Title]
- [Partner/agency rep]
- [Volunteer or community member]

WHY IT MATTERS:
Two short sentences tying the event to community benefit, local relevance, environmental significance, or public health/accessibility themes.

ACCESSIBILITY & LOGISTICS:
- Parking instructions
- Trail surface or mobility considerations
- ADA-accessible features
- Contact number for event-day coordination

RSVP (optional):
Not required for media, but helpful to gauge interest.
[Link or email]

You may also want to include directions to the event or a GPS point.

X. Fundraising

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

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

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

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

A. Potential Fundraising Activities

- Earned Revenue—refers to income generated through the sale of goods and services including program fees, contracts, retail sales, admissions. Even as a non-profit, we are required to collect sales tax on taxable items. Contact PPFF’s bookkeeper Bernadette Howard at bhoward@paparksanddforests.org for more information.
- Grants—including those from corporations, community organizations, government and foundations. Please remember that any grant activity must comply with the Grant Submittal Policy presently in effect at the time of the potential application. Find this in the Chapter Resources of the PPFF website.
- Annual Campaigns—including membership drives, special events, and annual giving.
- Membership Drives—focuses on renewing current members and attracting new ones. Generally done through direct mail, it can also be accomplished through telephone drives or one-on-one canvassing at special events or programs.
- Special Events—are a great way to reach a broad audience, attract new members, donors and volunteers and offer something back to the community. The drawback can be that they take a lot of time and effort to coordinate, they may lose money, and they may exclude certain audiences in the community.
- Annual Giving—generally includes reaching out to people outside your membership, although members of your group should also receive your appeals. These donations may be solicited through direct mail, via phone, or face-to-face. The gifts can range from small amounts to major and planned gifts. You can also become a designated group for memorial or honorial gifts. These are gifts made in memory of a loved one or to honor a special occasion – anniversary, wedding, etc.
- Small Games of Chance—**to apply for a small games of chance, you must follow the PPFF small games of chance policy and be a chapter in good standing with the foundation.** This is defined as a chapter who is current on ALL paperwork and who actively follows PPFF policies.

Fundraising Ideas

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

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

Things to Keep in Mind When Raising Money

Fundraise with a purpose

If your group regularly has a fundraiser that is unrelated to our mission you may need to pay business income tax on that income. For example, advertising in a newsletter could be consider unrelated business income.

If your group sells items to raise funds you must collect and pay Pennsylvania sales tax unless the items you sell are tax exempt. Sales tax is reported monthly. Contact Bernadette at bhoward@paparksandforests.org.

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

According to IRS guidelines for 2025, if an item is given in return for a donation, the value of the item may not exceed the lesser of **2% of the payment or $136** for the donation to be considered fully tax-deductible. This falls under the "low-cost article" exception for items of "insubstantial value".

How the limit works

The IRS provides two tests for when a "quid pro quo" contribution—a donation made partly as a contribution and partly for goods or services—is considered fully deductible.
For 2025, the item you receive has insubstantial value, and your entire payment is deductible, if:

- The fair market value (FMV) of all the benefits you receive is no more than the lesser of **$136 or 2% of your donation**.
- Your payment is at least **$68**, and the only items you receive are "token items" that bear the charity's name or logo (such as mugs or calendars), and the total cost of these items to the charity is no more than **$13.60**.

What happens if the item's value exceeds the limit?

If the value of the item you receive is more than the insubstantial value limits, your donation is not fully deductible. In this case, you can only deduct the portion of your payment that exceeds the fair market value of the item.

For example, if you pay $100 for a ticket to a charitable dinner and the meal has a fair market value of $40, you have made a charitable contribution of $60 ($100 minus $40).

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

B. Fundraising Tips for Friends Groups: Corporate Donors

Any business entity has the potential to become a corporate donor and sponsor. Current statistics indicate that business or corporations contribute about 5% of the total dollars given to charities and non-profit organizations.

Why do companies want to give?

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

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

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

We encourage friends to work with local businesses. As a statewide organization, PPFF is often working on relationships with state or national corporations. Contact PPFF if you have a question.

Profile of Good Prospects

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

Identify local businesses in your region and learn as much information about the company as possible to make an ask that is personal and focused. One of the best places to find the information is in your local library. The reference section usually contains a business directory such a Dun and Bradstreet that will give a profile of local companies.

It is helpful if you know one of the owners or employees.

Giving Policy

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

There is normally one person, often the public affairs officer, who is authorized to make donations. That person usually can give up to a certain amount without seeking approval from the board of directors. It is very important for you to know the amount and a simple question of the approval official will often produce the answer. Requests for larger amounts may result in long delays until the request can be considered by the board of directors.

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

Getting a Foot in the Door

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

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

The Presentation

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

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

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

The Follow Through

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

XI. Partnering with Others

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

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

Advantages of Partnerships

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

- Increased potential funding support

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

- Identify who you can partner with based upon your goals and work plan. Brainstorm possible partners.
- Determine what you want to gain from the partnership and what expectations you have for a partnership.
- Meet with potential partners to explain project and explore the pros and cons.
- Decide who will do what. Clearly outline responsibilities in writing and what resources each of you will contribute.

Possible Partnership Opportunities

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

Pitfalls

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

Guidelines

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

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

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

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

XII. Volunteers

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

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

A. Member vs. Volunteer

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

Do you need members or volunteers?

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

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

B. Finding and Recruiting Volunteers

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

People volunteer for several reasons:

- To help
- To meet people
- To network
- To increase their sense of self
- To develop skills
- To gain experience
- To enhance their resume
- For prestige or recognition
- Commitment to the cause
- To fulfill a personal need or value
- To give something back

The type of volunteer event also varies. For example:

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

- Virtual volunteers—folks who may have an interest in helping but can't commit to a set time. These volunteers may be willing to design websites, develop brochures, edit the newsletter, etc.
- Adult recreation volunteer events.
- Micro volunteers: contributes to a cause by completing short, low-commitment tasks, often online and in small increments of time, such as a few minutes to a few hours.

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

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

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

Additional Tips to Keep in Mind:

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

Where to Recruit

- Newsletters
- Articles in local newspaper
- Brochures at park
- Trade shows or exhibits
- Local schools and universities
- Community meetings and groups
- Environmental or special interest groups
- Regional volunteer centers or organizations
- Strategic partnerships
- Volunteer Search websites
- Referrals
- Special events
- Service clubs
- Social media

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

Managing Volunteers

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

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

All new volunteers should receive an orientation that includes:

- Information on the organization's mission.
- Contact information for chapter contact person.
- Program and event brochure.
- Training for the tasks in which they will be involved—no matter how simple the task!
- Depending on the task, the volunteer may need to have background checks performed.

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

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

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

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

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

Recognizing Volunteers

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

Provide refreshments at volunteer tasks and assignments.

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

Celebrate volunteers' contributions:

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

The Nonprofit Center at LaSalle University (Nonprofit Management and Leadership - The Nonprofit Center at LaSalle University) offers these two helpful checklist reminders:

Ten Mistakes to Avoid When Working with Volunteers

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

Ten Things to do When Working with Volunteers

1. Delegate!
2. Focus on Fun!
3. Know what you need volunteers to accomplish.
4. Watch out for too many meetings.
5. Avoid leadership burnout.
6. Start with people you know.
7. Jump start recruiting with a special event.
8. Put someone in charge.
9. Be welcoming to volunteers.
10. Say thank you!

See the Appendix for a sample Position Description.

C. Where to Go for More Information

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

Energize, Inc. (www.energizeinc.com)

Points of Light (www.pointsoflight.org)

Nonprofit Risk Management Center (www.nonprofitrisk.org)

Volunteer Match VolunteerMatch is now part of Idealist! For Nonprofit Jobs, Volunteering, and More - Idealist

XIII. Helpful Tips for Park Managers and District Foresters with Friends Groups

By our bylaws, you serve as an ex-officio member of the Friends board of directors. As such, you are a non-voting member but do have the ability to contribute insight and data. Ultimately, according to the Memorandum of Understanding between the friends group and PPFF, the park or forest management plan is a deciding factor in the projects and activities of the group.

Attending meetings—or having staff representation at a meeting—helps both you and the chapter by opening the lines of communication, building relationships, and understanding the skills and desires of the board members/volunteers.

All friends group communications must include you, as ex-officio board member. If the group is using a communication tool through which you are unable to participate, please let them know.

It is helpful to read the Chapter Handbook so that you, too, are knowledgeable on the processes of the Foundation.

Please make sure that original signatures are used on check requests. Pre-signing requests that bypass your involvement bypasses a check and balance system developed in cooperation with DCNR.

When park or forest staff needs to make a purchase, please make sure that the expense has been approved by the friends group and, when possible, provide an invoice or quote from which PPFF can make a payment. We prefer to pay the vendor directly, as opposed to reimbursing state park and forest staff. We acknowledge that there may be emergencies that require reimbursement, but even in an emergency situation have the expense approved by the group before making the purchase.

Please note: Any reimbursement to friends or staff needs to contain a receipt for expenses paid.

For grants and small games of chance, there are specific protocols that need to be followed. Some of those protocols require a letter from you, the manager.

If you ever need to talk, please do not hesitate to reach out—we are here to help.

Please note that no two friends groups are the same. An approach that may have served you at a previous location may not serve in a new location.

XIV. Acknowledgment of Receipt and Review

I hereby acknowledge, on behalf of the Friends of ____, our Chapter's receipt and review of the Chapter Handbook as updated and revised in November 2025.

FRIENDS OF _______________________________

By ____

__________________________________, Chair

(Typed Name)

Date: ______________________________________

XV. Appendix

Checklist of Regularly Required Submissions

This Handbook sets forth a number of documents a Chapter is regularly required to submit to PPFF. Use this checklist to be sure you are in compliance with them.

Event Payout Report

When prize money is awarded (either through a cash payment or a gift card or other voucher), all prizes must be tracked and recipients need to sign to acknowledge their receipt of the prize. A sample report, based on a bike race, is attached as a sample but should obviously be modified to reflect the nature of your event.

Professional In-Kind Hours

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

Volunteer Sign-in Sheet

Please remind your volunteers that they should sign up as a DCNR Conservation Volunteer through DCNR's website (at present at https://www.volunteers.dcnr.state.pa.us/index.aspx - this website is undergoing a wholesale upgrade, however). In the meantime, this sign-in sheet or something like it should be available at every volunteer event, both to identify anyone who was present for your event and to track participation.

Hours Trackers

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

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

- Meetings
- Programs
- Volunteer Days

Crafting a Volunteer Position Description

Robust volunteer position descriptions are an integral component to an effectively managed volunteer program. Developing volunteer position descriptions is an opportunity to intentionally map out what your organization needs help with and how volunteers will ultimately support your mission. They are the foundation upon which good recruitment campaigns are built. They set expectations with volunteers and give you something to base performance reviews on. So just as you would for a staff member, develop a detailed position description for volunteers that clearly defines the activities and responsibilities of the role as well as minimum and preferred qualifications.

Volunteer position descriptions should include:

- ***Position Title***: Titles denote respect and authority. Recognize your volunteers with a title that is appropriate to their role.
- ***Purpose***: What is the ultimate goal of this position? How does it relate to your mission? What does success look like?
- ***Position Summary***: What are the primary duties and responsibilities of this role? Write a clear and concise position description.
- ***Benefits***: What can a volunteer expect to get out of this opportunity?
- ***Reports to***: Who can the volunteer turn to for the guidance and support necessary to fulfill this role?
- ***Skill Set***: What qualifications, skills and proficiencies are needed to fulfill this role?
- ***Commitment***: What are your expectations in terms of duration of the role overall, the number of hours needed, or duration and frequency of shifts?
- ***Time***: What are the times that this position is available for? The more options you can provide, the more likely an individual will be to find a time that works for them.
- ***Location***: Is this work all on-site or are there considerations to be aware of?
- ***Contact Details***: How do you want them to contact you? Email? Website? Phone? Mail?

Whether you are looking for a large number of general volunteers for an ongoing program or an individual with a particular skill set, be as specific as you can about the role and the skills needed.

Adapted from resources prepared by 501Commons.org

A. Checklist of Regularly Required Submissions

	Required submission	When/How Often Required	To Whom It is Sent
	Minutes of Board Meetings	Monthly (or following regularly scheduled meeting)	Marci/Pam
	Inventory of Sales Items	January/June	Marci/Bernadette
	Your deposits	On a regular basis. Don't hold checks. It sends a signal to your donors that the contributions aren't important. If you have taxable sales, it delays payment of sales tax.	Bernadette
	Conflict of Interest forms Code of Conduct forms Annual report (including board list and end of year inventory)	Annually (by January 31 each year)	Marci/Pam
	Changes to board make-up	As they happen (protect your board members by always making sure we know who they are). Please have all new board members complete the Conflict of Interest and Code of Conduct forms right away. Keep copies for your own records.	Marci/Pam (Bernadette if treasurer)
	Requests for insurance	As needed but at least 3 weeks before an event where it will be needed.	Bernadette/Chapter Coordinator
Get in the habit of sending in:			
	Notice of events	When scheduled – we can get them on our calendar and in social media and chapter coordinator can make arrangements to attend	Pam/Chapter Coordinator
	Your meeting schedule	It's included as part of the annual report – good to keep us informed when you are meeting so chapter coordinator can make arrangements to attend	Pam/Chapter Coordinator

B. Event Payout Report

Category	Place	Rider Name	Bib Number	Payout Amount	Payout Method (e.g., cash, gift card, etc.)	Date Paid	Signature/ Confirmation of Receipt	Notes: Any special remarks (e.g., tie, special prize, unclaimed)
Expert-Open	1							
	2							
	3							
Expert-40+	1							
	2							
	3							
Expert-Single Speed	1							
	2							
	3							
	2							
	3							
Totals		**Total Riders:**		**Total Paid:**				
Date of Race:								
Person in Charge of Payout:								

C. Professional In-Kind Hours

FRIENDS OF ___________________________

Type of Activity: ____ ***Date***: ____________________

Hours Performed By: ____

Title: ____

	Date	*Time In*	*Time Out*	*Hours Worked*	*Location*	*Equipment*	*Work Performed*
1.							
2.							
3.							
4.							
5.							
6.							
Total Hours:					*Signature*:		

D. Volunteer Sign-In

FRIENDS OF ___________________________

Type of Activity: ____ ***Date***: ____________________

	Name	***Time In***	***Time Out***	***Hours Worked***
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				
13.				
14.				
15.				

E. Hours Tracker - Time Spent at Chapter Meetings

FRIENDS OF ___________________________ MEETINGS				
Date	***Time***	***Location***	***Members Present***	***Total Hours***
1/4/2026	*8:00 to 10:00*	*Park Office*	*10 (+ park manager and EES)*	*20*
	Total Hours			

F. Hours Tracker – Time Spent at Friends Groups Programs

FRIENDS OF ______________________________ PROGRAMS

Date	***Program***	***Attendance***
1/4/2026	*First Day Hike*	*15*
	Total Attendance	

G. Hours Tracker – Time Spent on Volunteer Work Days

FRIENDS OF _____________________________ WORK DAYS

Date	*Project*	*Time*	*Hours Worked*	*Number of Volunteers*	*Total Volunteer Hours*
4/22/2026	*Trail clean-up*	*8:00 to 1:00*	*5*	*4*	*20*
					0
					0
					0
					0
					0
					0
					0
					0
					0
					0
					0
					0
					0
					0
					0
		Totals	0	0	*0*

H. VOLUNTEER POSITION DESCRIPTION

Position Title:

Purpose:

Primary Duties and Responsibilities:

What You May Enjoy:

Reports to:

Skills Required:

Commitment:

When Needed:

Where Needed:

Contact the Friends: