

# REDSTONE



SEPTEMBER 19, 2022

## The 2022 Park Partners Report: A Story of Resilience

COMMISSIONED BY



**National  
Park Foundation**

— WONDER CALLS —

Olympic National Park

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# Introduction



National parks rose to new prominence over the last two years. The pandemic reawakened our love for national parks with more and more Americans looking to our shared outdoor spaces for comfort and connection. Many in the parks community elevated the need to make national parks and public lands accessible to all. Congress passed the Great American Outdoors Act in an unprecedented bipartisan vote, resulting in a once-in-a-lifetime source of funding to address the growing deferred maintenance backlog in national parks as well as land conservation and recreation needs in our public spaces. Congress also passed legislation that will support NPS operations with \$500 million through 2030 to hire additional personnel.<sup>1</sup> And the national park partner community – composed of 470 organizations across the nation including friends groups, cooperating associations, coordinating entities, and other organizations<sup>2</sup> – remained resilient by

supporting national parks, heritage areas, trails, and rivers during this challenging time.

The 2022 edition of the Park Partners Report provides a snapshot of the national park partner community, building on the 2015 and [2020 Park Partners](#) reports. The report depicts changes in the community over time and highlights park partners' current impacts, challenges, needs, and successes.

This report can inform how the National Park Service (NPS), the National Park Foundation (NPF), the National Park Friends Alliance (FA), and other stakeholders engage with, draw on, and support the partner community, as well as serve as a resource for partners themselves. It also surfaces a set of common goals and challenges for the community to be aware of and address together.

1. [Inflation Reduction Act of 2022](#).

2. See Appendix B for definitions of the partner types. See the 2020 report for the full list of park partners.

The following report details the enormous resilience of the community over the last two years, covering the following findings:

- **With more than \$400 million in support in 2021, the park partner community's impact on NPS's mission remained strong.** Many partners are providing more and more basic operational support, and three quarters of survey respondents report serving as educational partners to parks. In 2021, the community also generated more than \$600 million in park-related revenue despite the challenges that smaller groups and groups dependent on earned revenue faced.
- **Partners have a positive outlook on growth in the year ahead.** Almost 90% of partners expect financial contributions to parks to meet or exceed pre-pandemic levels in 2022, and many expect to grow their teams. Partners are planning a broad variety of projects over the next several years, many of which focus on visitor experience.

- **Partners are increasingly limited by capacity constraints.** Lack of internal and NPS staff capacity is a major challenge for partners, who seek increased fundraising supports and enhancements in NPS policies and procedures to address capacity constraints.

- **NPS and park partners can work together to:**

- Build NPS capacity, including enhancements to policies and procedures as well as accelerating targeted hiring and training practices in the NPS workforce
- Facilitate cross-partner learning and extend support to meet current partner needs
- Identify emerging trends and address challenges of tomorrow.

# The impact of the partner community on our parks remains strong

Partners support NPS’s mission directly and indirectly, through philanthropic giving, management of programs and services, engagement of volunteers, support of staff and operations, and much more. Many partners adapted their support to new needs over the past two years, whether converting in-person programs to virtual, taking on additional park operational support, or delivering impact with limited resources.

## Partners contributed over \$400 million to NPS in 2021

We estimate partners contributed \$420-\$440 million to NPS in 2021 through all forms of support, similar to the 2019 estimate of \$430 million.<sup>3</sup>

Support to NPS in 2021 varied across organization type: as Figure 1 shows, friends group and coordinating entity support decreased, while cooperating association and “other” organiza-

tion (e.g., land trusts, service corps, educational organizations, NPF) support increased. These increases are largely attributed to sizeable increases for several large organizations.

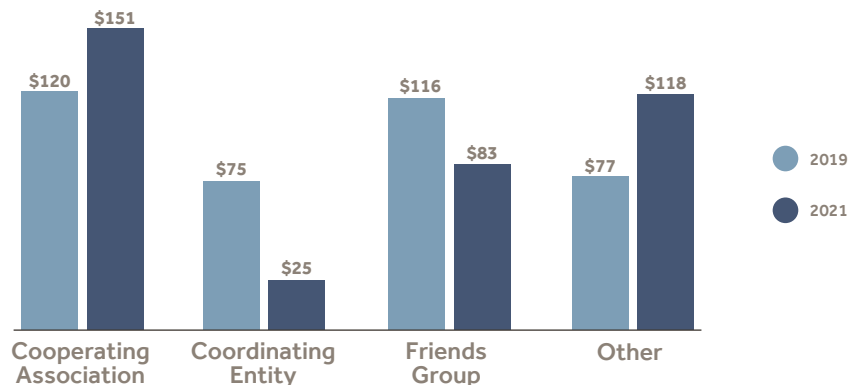
Organizations also engage a sizeable volunteer workforce: two-thirds of organizations report working with volunteers. The 50 organizations that responded when surveyed collectively contributed 984,000 volunteer hours to NPS in 2021 – about 15% of NPS’s total volunteer hours.<sup>4</sup>

## Partners support parks through a wide range of activities, with education the most common

Partners continue to engage in a variety of activities, with three-quarters of organizations serving as educational partners to parks, and more than half involved in restoration of historic structures and diversity, equity, inclusion, or racial justice

**FIGURE 1: CHANGES IN SUPPORT TO NPS VARY BY GROUP**

Estimated support to NPS for organizations with available data in both 2019 and 2021, by organization category, \$ millions  
n = 128

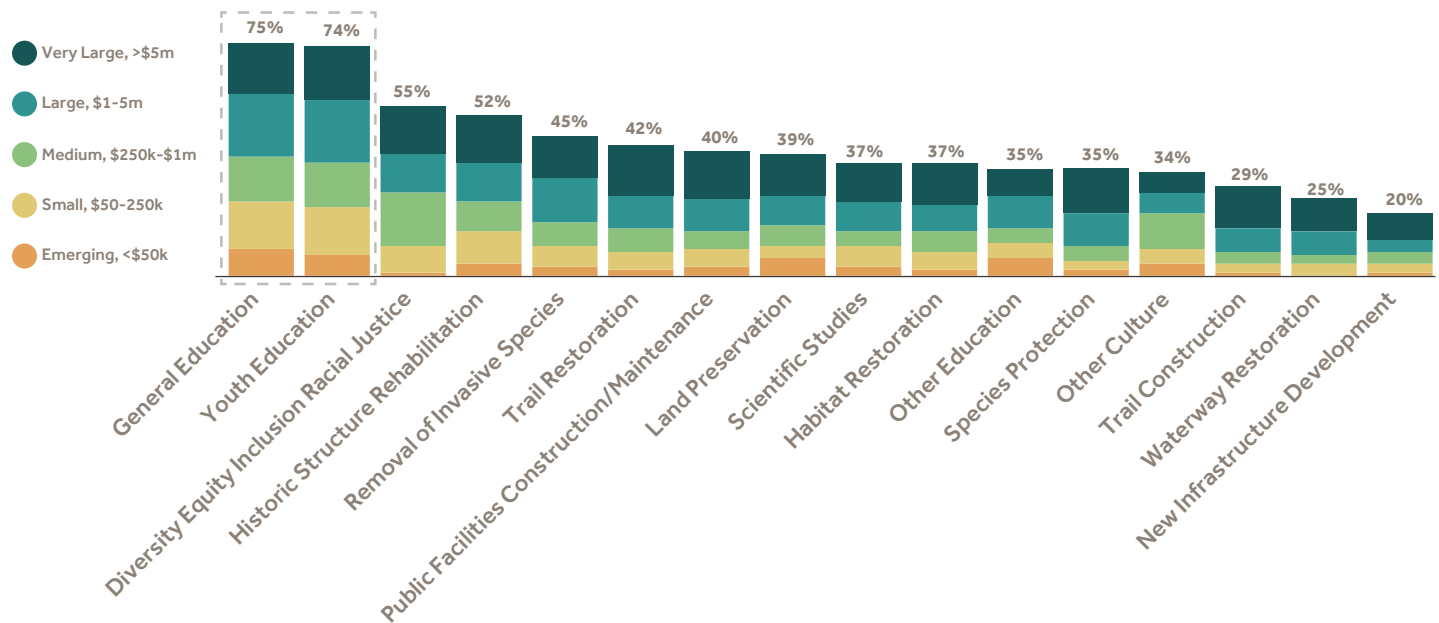


3. See Appendix C for methodology on how support to parks was calculated.

4. [NPS estimates 6.5 million volunteer hours per year.](#)

**FIGURE 2: VAST MAJORITY OF ORGANIZATIONS PROVIDE EDUCATIONAL SUPPORT TO PARKS**

Percent of organizations participating in each activity, n= 104



efforts such as engaging historically excluded communities (Figure 2). While larger groups are more likely to engage in activities such as species protection, trail construction, and waterway restoration, small to medium-sized groups have a stronger “culture” focus than larger groups, perhaps because many smaller organizations partner with parks dedicated to history and culture.

Partners described delivering impact in a variety of ways. Examples over the last two years include:

- **Restoring historic structures:** Friends of Great Smoky Mountains National Park (NC and TN) established a \$9 million endowment for Historic Preservation – Forever Places, a program to restore historic cabins, churches, mills, and barns.
- **Engaging historically excluded communities:** The Student Conservation Association and Conservation Legacy worked to engage indigenous youth in service projects; The

National Park Trust reported welcoming tens of thousands of kids each year from historically excluded communities to their national park units. The Ice Age Trail Alliance (WI) worked to identify new and different user groups, understand barriers and societal inequities that prevent people from enjoying the Trail, and ensure inclusivity of the organization.

- **Preserving land:** Trust for Public Land and the Friends of Hawai'i Volcanoes National Park added over 16,000 acres to the Hawai'i Volcanoes National Park through the Pōhue Bay Conservation project.
- **Scaling education practices:** The National Washington-Rochambeau Revolutionary Route Association completed a replicable teachers' toolkit based on a survey of teachers' specific needs in Virginia conducted by project partner The Real American Revolution Multimedia Center.

## Partners are increasingly providing operational support to parks

Partners also report increasingly taking on park functions. A large partner noted that their staff members have to regularly help visitor contact staff when NPS staff positions have not been filled. The Santa Monica Mountains Fund contributed 91,000 hours of labor support, equivalent to 43 full-time employees, to the Santa Monica Mountains National Recreation Area for restoration, research, facilities, and youth projects. Park partners, whether staffing visitor centers or taking on park maintenance, are extending support of parks beyond programmatic activities and philanthropy to help ensure parks can operate smoothly and continue to serve the public.

## Partners and parks navigated a range of challenges exacerbated by the pandemic, with groups that rely on earned revenue and smaller groups most challenged

The pandemic, the “Great Resignation,” rapid inflation, and the growing housing crisis all impacted the park partner community. When asked to share their greatest success of the past year, organizations mentioned weathering or adapting to the pandemic more than any single other topic, illustrating the stark reality that organization survival was the top priority for many organizations.

One partner said, “The last 2 years have been dismal for our park as they have struggled to keep the lights on and the visitors center open,



all while continuing to hemorrhage staff. We have no Chief of Interpretation or staffing for law enforcement, maintenance, and natural or cultural resource protection. Therefore, our greatest success has been being able to support our park through these tough times by adding staff to build their capacity. Our role has been increasingly vital to their basic operations.”

Despite the pandemic’s challenges, the park partner community generated an estimated \$680-\$880 million in park-related revenue in 2021.<sup>5</sup> This revenue estimate represents an increase of up to 40% from 2018, with the top of the range roughly equivalent to 2019 park-related revenue.<sup>6</sup>

Yet while the community’s total parks-related revenue increased from 2018 to 2021, about half of partner organizations reported a decline in revenue during that time period.

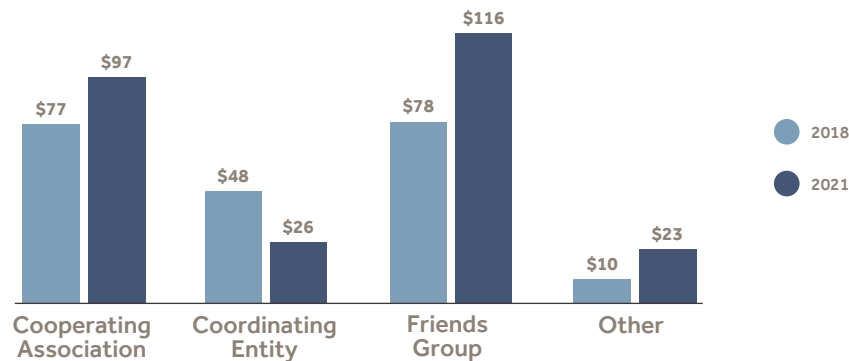
Groups whose earned revenue accounted for 25% or more of total parks-related revenue

5. Approximately 60% of revenue is contributed, 25% is earned, and the remaining 15% is other revenue, or unaccounted for in survey data.

6. See Appendix C for methodology on how parks-related revenue was calculated.

**FIGURE 3: 2021 PARK SPECIFIC REVENUE EXCEEDS 2018 LEVELS**

Estimated park related revenue for organizations with available data in both 2018 and 2021, by organization category, \$ millions  
n = 96



reported an average revenue decline of \$1.6 million, in contrast to an average increase of \$500,000 across all groups. Organizations dependent on earned revenue may have been disproportionately impacted by the pandemic’s effect on in-person sales and programming due in good part to park closures and program cancellations. Despite decreases in revenues for some groups, cooperating associations and friends groups saw revenue increase in aggregate during this period (Figure 3), largely attributed to sizeable increases for several large organizations.

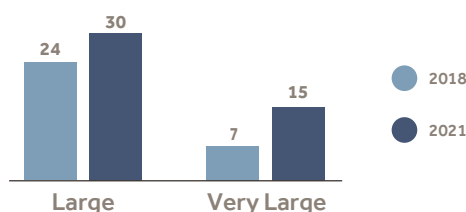
Emerging and small groups also reported bigger declines in revenue on average than large

groups, demonstrating their vulnerability to COVID and other external shocks. Across organization types, the number of groups with over \$1 million in park-related revenues increased from 2018 to 2021 (Figure 4). This increase in the number of large organizations perhaps accounts for some insulation to COVID’s more devastating impacts in the community. In addition, more, larger, groups may be partially driving the overall increase in total park-related revenue in the community from 2018 to 2021.

Large groups may have benefited from several advantages, including larger endowments and more fundraising staff. They also had the ability to apply for federal and local recovery funding. Half of the organizations that work exclusively with NPS that completed the survey have endowments; unsurprisingly, larger organizations have larger endowments (Figure 5). These groups benefited from the valuation increases in financial markets that occurred despite COVID effects on the real economy. Larger groups also have more fundraising staff: small and medium groups have less than 1 FTE on average dedicated to fundraising, while very large groups have more than 10 on average.

**FIGURE 4: LARGE GROUPS GET LARGER**

Count of organizations by park-related revenue category with available data in both 2018 and 2021

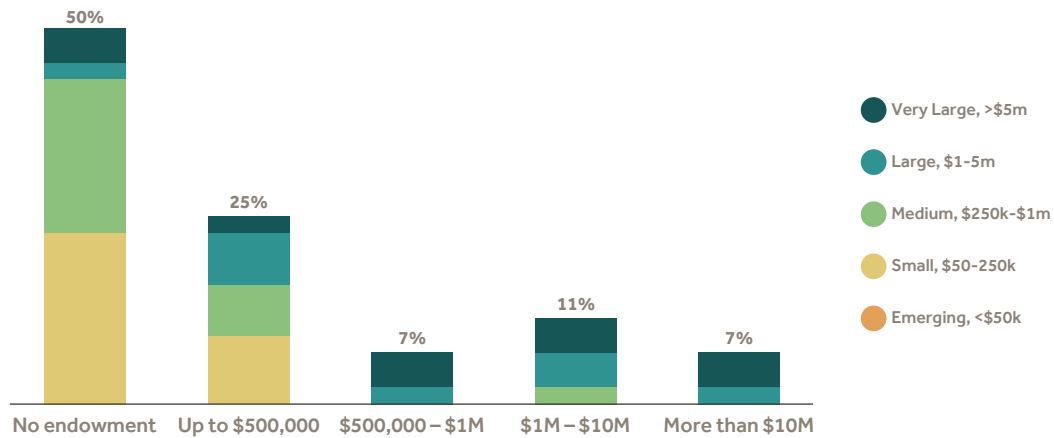


Large: \$1,000,001-\$5,000,000 | Very Large: Over \$5,000,000



**FIGURE 5: HALF OF ORGANIZATIONS HAVE ENDOWMENTS**

Percent of organizations that dedicate 100% of their work to NPS by size with endowment type, n = 44



### Park partner staffing declined since 2018

Despite an increase in revenue since 2018, park partners saw staff reductions. Partners reported 7,700 employees in aggregate in 2021, a 9% decrease from the 8,500 reported in 2018. Lack of staff capacity was reported as a top concern for park partners, with reasons for staff shortages varying by park and partner organization. While park visitation in 2021 overall was down 7% from 2018 levels, it increased 25% from 2020 levels<sup>7</sup>, challenging some partners who sought to hire during widespread labor shortages seen in many industries.



7. National Park Service. [Visitation Numbers](#).

# Signals point toward recovery

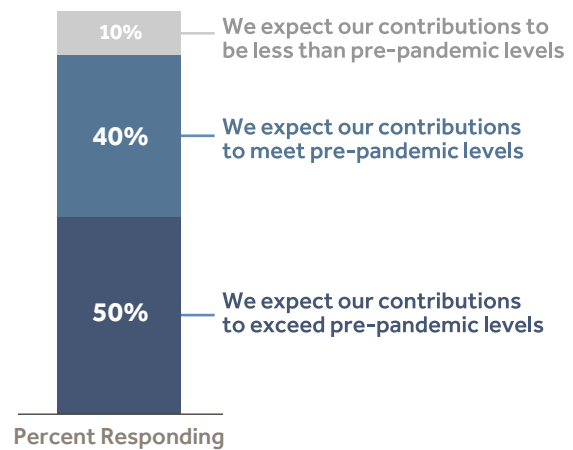
## Partners have a positive outlook on growth in the year ahead

Partners are largely optimistic about the next year and beyond. Almost 90% of organizations expect financial contributions to NPS to meet or exceed pre-pandemic levels in the coming year (Figure 6).

The park partner community also expects to grow staff capacity in the coming year, adding an average of 2 full time employees. Emerging, small and medium organizations expect to add less than 1 employee on average. Large organizations expect to add 1.7 on average, while very large organizations expect to add 6.4 on average. Figure 7 provides expected average annual growth rate by group size.

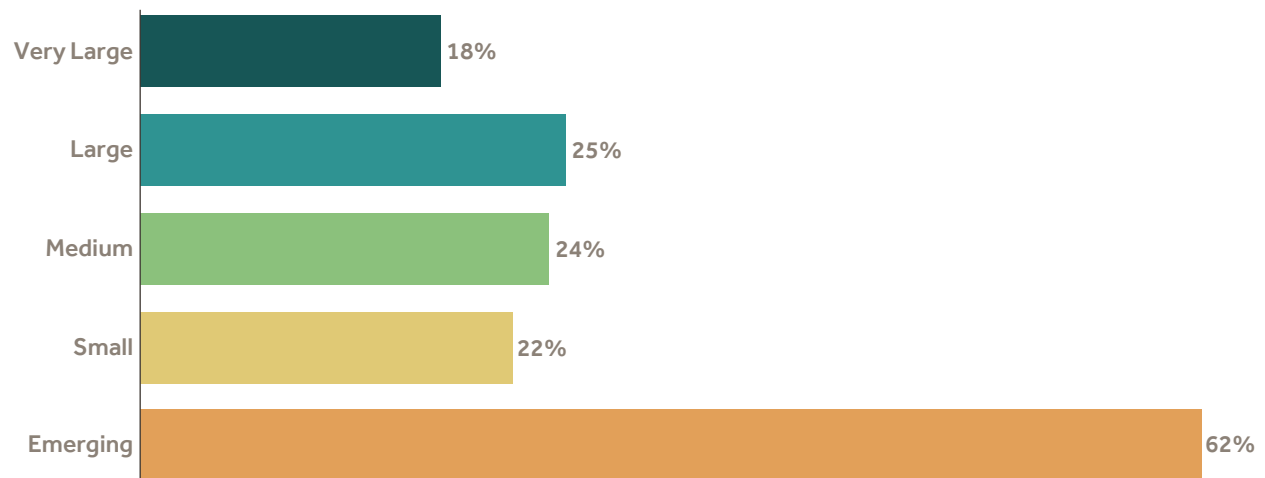
**FIGURE 6: MOST ORGANIZATIONS EXPECT FINANCIAL CONTRIBUTIONS TO NPS OVER THE NEXT YEAR TO MEET OR EXCEED PRE-PANDEMIC LEVELS**

Percent of organizations by expectation, n = 102



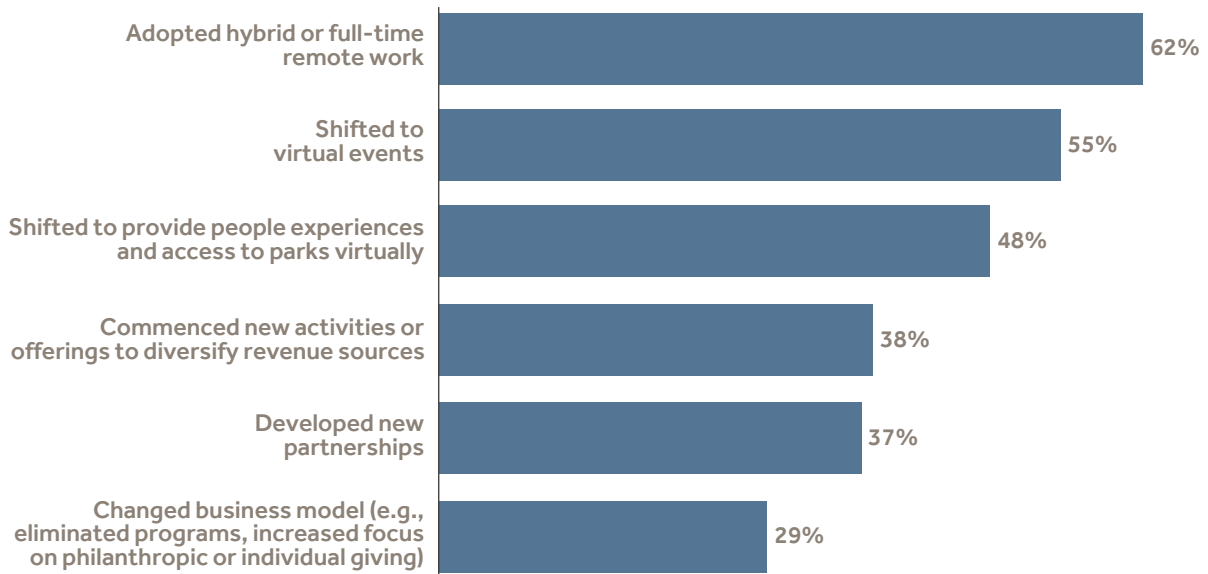
**FIGURE 7: ORGANIZATIONS OF ALL SIZES EXPECT TO GROW NEXT YEAR**

Mean percent estimated growth (new employees added) over the next year, n = 126



**FIGURE 8: THE PANDEMIC SPURRED PERMANENT CHANGES FOR MOST ORGANIZATIONS**

Percent of organizations adopting permanent changes in response to COVID-19, n = 97



### Park partners are integrating innovative practices into mainstream operations

Beyond the numbers, many organizations are celebrating newfound, lasting innovation that started during COVID. More than half of organizations (Figure 8) have made permanent changes to provide virtual events and adopted hybrid or full-time remote work.

One partner said: “Some of our education programs and forums have had a much wider reach because more of them have been done virtually. Staff satisfaction is higher because the staff do not have to commute into work every day. It is easier to convene short committee meetings with our trustees. Our virtual presentations and workshops have become part of our on-going interpretive and educational materials because they can be used over and over again.”

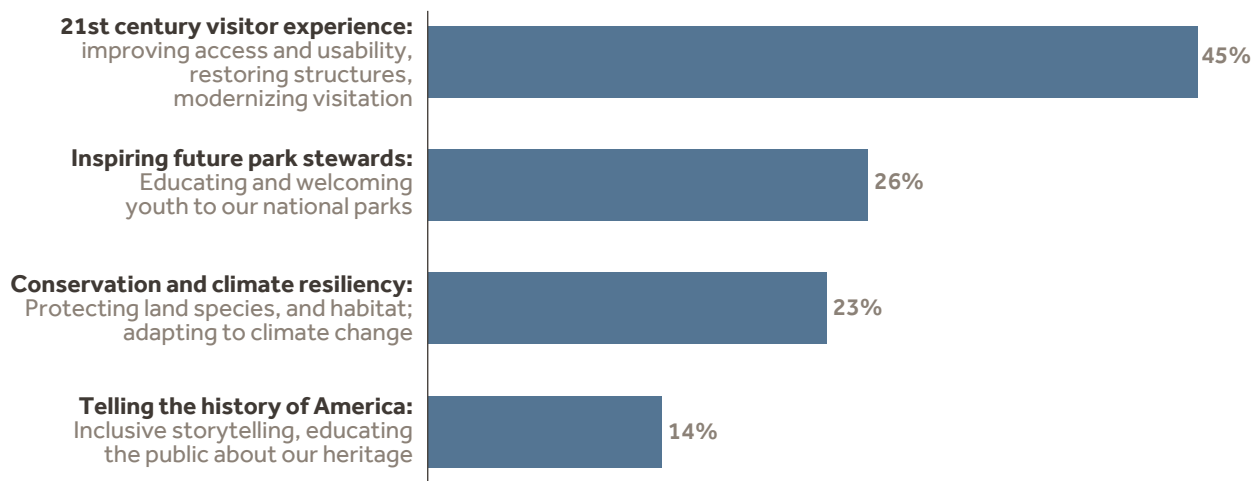
Another partner said: “Virtual programming increased our attendance by over 100%. Subsequent recordings of presentations were archived and re-used on websites, blogs and numerous other applications to further extend our outreach. Learning how to use technology has accelerated our learning curve and hence introduced us to other possibilities in the virtual world (i.e. video for online access, designing our website and virtual programming to be accessible, collecting important data, and better meeting the needs of our supporters).”

### Partners are planning new projects with superintendents over the next 3-5 years

Partners are building on this momentum and planning new projects and opportunities over the next 3-5 years, from land acquisition to workforce housing. While more partners are focused

**FIGURE 9: PARTNER PRIORITIES VARY: MANY FOCUS ON VISITOR EXPERIENCE**

Percent of organizations proactively mentioning each area as a priority over the next 3-5 years,\* n = 125



\*Many partners detailed priorities in multiple areas

on visitor experience than any other category (Figure 9), many partners are pursuing multiple priorities in parallel over the next several years.

Examples of partner priorities include:

- **21st century visitor experience:** Nearly half of partners are prioritizing visitor experiences, whether developing new visitor centers or expanding trails. For example, The Zion National Park Forever Project (UT) is investing in the East Zion Initiative. It will include a new Visitor Center, 70+ miles of hiking and biking trails, a transportation hub, and interpretive educational experiences developed and designed with voices from federal, state, local, and tribal stakeholders.
- **Conservation and climate resiliency:** Nearly a quarter of partners are prioritizing climate and conservation. For example, Save the Dunes Conservation Fund (IN) plans to develop shoreline erosion resilience and climate solutions with local surrounding communities in Northwest Indiana. It

also plans to launch a Corporate Partnership program with local shoreline industries to include volunteer days in the national park as they continue supporting environmentally friendly practices and pollution prevention from these companies.

- **Inspiring future park stewards and telling the history of America through inclusivity and access:** Over 20% of partners described a diversity, equity, and inclusion (DEI) priority, with 9% focused on indigenous communities. For example, Great Basin National Park Foundation (NV) is expanding outreach to diverse and historically excluded youth, both tribal and non-tribal, in urban areas. Cache La Poudre River National Heritage Area (CO) is focused on inclusive storytelling of indigenous peoples and immigrants. The National Park Foundation launched an Inclusive Storytelling Grant designed to support projects that help the National Park Service share more inclusive and comprehensive narratives, reduce park Storytelling backlogs and invest in staff capacity to sustain transformative interpretation.

# Partners are increasingly limited by capacity constraints

## Lack of internal and NPS staff capacity is a major challenge

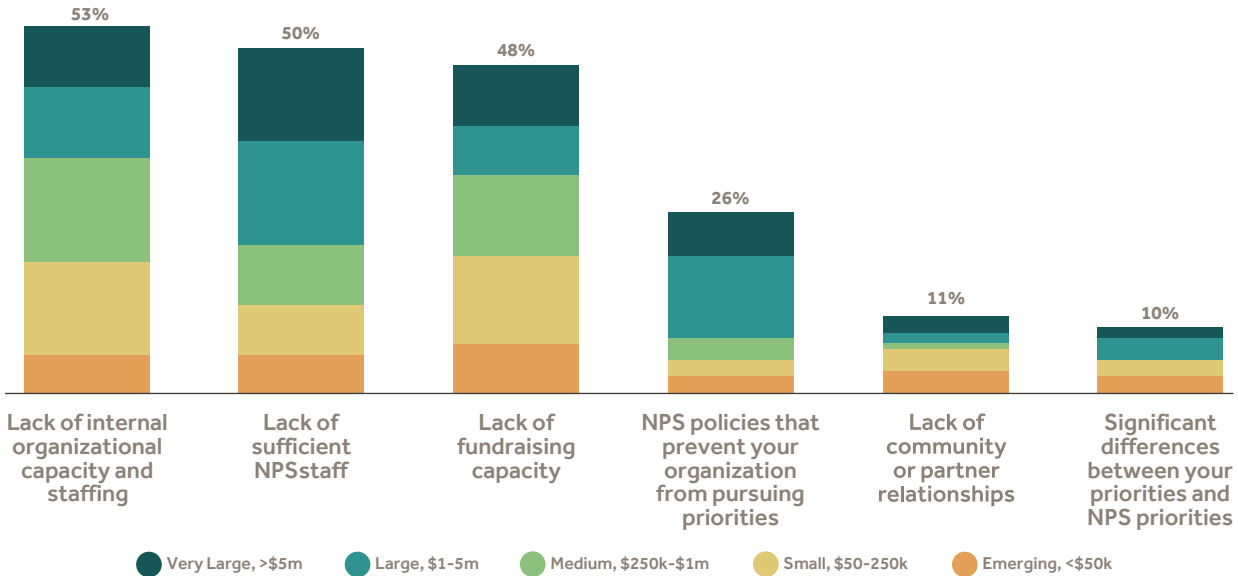
While partners are planning a variety of ambitious and impactful projects, they are also challenged by several potential barriers. Partners identified capacity (internal and NPS) as their top challenge this year (Figure 10) – overtaking fundraising which was the number one challenge identified in the 2020 report. Smaller organizations report being more limited by internal capacity and larger organizations by NPS capacity. NPS limitations include inadequate time to coordinate on partnership projects, lack of staff to manage and complete projects, turnover among NPS staff, and policies that impede the progress of projects such as workplans focused on annual goals versus multi-year goals, delays in partnership agreements, donor vetting procedures, and delegation of authorities.

## Partners of all sizes request fundraising support

When asked what areas of support would be most beneficial to them, partners emphasized fundraising (Figure 11). This holds true for organizations of all sizes outside the very largest, illustrating this is a need that extends beyond the smallest partners, though as Figure 10 shows, it is less of a barrier for large organizations. The challenges of the past few years have only amplified the fundraising needs partners face as they continue to provide important services to parks.

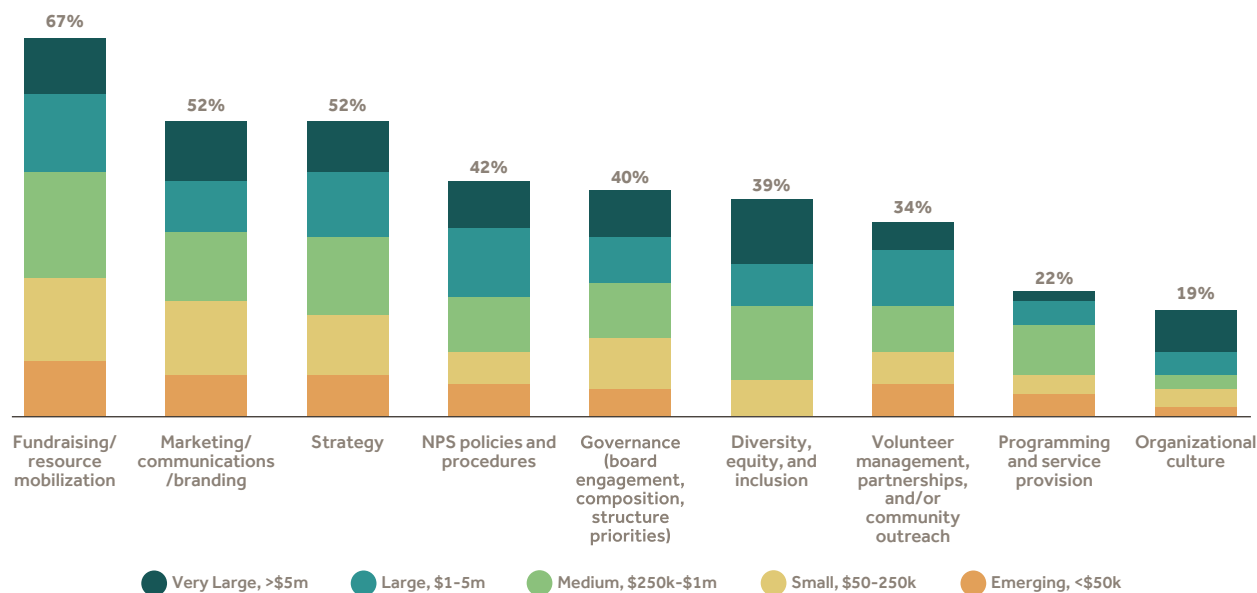
While fewer organizations requested DEI support than in 2020, more than half of organizations requested support in marketing and communications, and in strategy. Requests for board support – whether training, recruitment, fundraising, or providing clarity around Director’s Order 21

**FIGURE 10: LACK OF CAPACITY IS THE BIGGEST BARRIER TO PARTNER SUCCESS**  
 Number of organizations choosing each area as one of their biggest limitations in maximizing impact on NPS, n = 126



**FIGURE 11: PARTNERS CONTINUE TO REQUEST FUNDRAISING SUPPORT**

Percent of respondents choosing each category as 1 of 5 areas from which they would benefit from training, new tools, or support  
n = 122



(DO21) and the Donations and Philanthropic Partnerships Reference Manual 21 (RM21) – was a common theme in survey open answers.

### Changes in park partner diversity can be measured over time

Park partner board and leadership diversity can be tracked over time and compared to environmental non-profit benchmarks (Figure 12). The [Green 2.0 2021 NGO & Foundation Transparency Report Card](#) shares environmental NGOs

on average have more than 25% senior staff who identify as persons of color (POC) and more than 30% POC board members, compared to approximately 10% POC partner leaders and board members. This benchmark can help park partners see how their diversity fares relative to sector averages and to measure changes in the community over time. We recognize leadership diversity is only one component of a diverse, equitable, and inclusive organization, and one of many important lenses for partners as they continue to prioritize equity and inclusivity in their strategies and operations.

**FIGURE 12: PARK PARTNER BOARD AND LEADERSHIP DIVERSITY RELATIVE TO INDUSTRY AVERAGES**

	SURVEY RESPONDENT BOARD DIVERSITY	GREEN 2.0 BOARD DIVERSITY	SURVEY RESPONDENT LEADERSHIP DIVERSITY	GREEN 2.0 LEADERSHIP DIVERSITY
<b>Black, Indigenous, or people of color</b>	10%	30%	11%	25%
<b>Women or non-binary</b>	27%	–	44%	–
<b>50 years old or younger</b>	17%	–	32%	–

## Capacity and fundraising challenges serve as the foundation for partner suggestions to NPF, the Friends Alliance, and NPS

In addition to the specific requests for areas of support in Figure 11, partners offered suggestions to NPF, the Friends Alliance, and NPS. Partner suggestions to NPF and the Friends Alliance closely track the areas of support above, including requests for additional fundraising and marketing trainings. Partners appreciate and seek more opportunities to collaborate and learn from peers, both virtually and in-person (e.g., regional trainings), with some requests for participation assistance (e.g., scholarships and travel support).

Partners want to work with NPS to address challenges related to two of the barriers described above: insufficient NPS staffing and NPS policies and procedures that obstruct partner priorities. Specifically, partners suggest a focus on hiring and flexibility. They describe high NPS turnover, slow hiring, and slow onboarding, and suggest NPS increase efficiency in hiring practices, assign a liaison to work with partners, and train staff on the role of partners and value of philanthropy. Partners continue to request more flexibility in policies and procedures where feasible (e.g., reducing Public Land Corps (PLC) matching requirements; longer terms on agreements, updating processes for donation review), while providing consistency in contracting and standardized practices across parks.



# Recommendations



## Progress on recommendations from the 2020 report is ongoing

The 2020 report raised three recommendations to guide the partner community over the next few years. Progress has been made on each recommendation:

### Create a five-year plan to build the capacity of the park partner community, particularly small and medium-sized organizations, with an emphasis on fundraising, communications, DEI, and strategy

➤ **Partner capacity supports have been bolstered.** The Friends Alliance hired an Executive Director and is increasing its own capacity to support partner organizations. Affinity groups and new Friends Groups have been established and continue to evolve, and Friends Alliance meetings have provided opportunities for increased collaboration.

NPF developed a 5-year Community Partnerships Strategic Plan and increased its own capacity to better serve the partner community, including building out a resource portal. Since 2020, NPF supported 48 park partners through *Strong Parks, Strong Communities* (SPSC) grants and organizational capacity building, and 36 individuals with professional development capacity building. In 2021, NPF supported 117 park partners with nearly \$10 million in grants. In addition to SPSC, these grants supported Open Outdoors for Kids, Service Corps, and other projects such as teaching traditional fishing methods at Knife River Indian Heritage Foundation and co-creating national park opportunities with Outdoor Afro.

**Strengthen the National Park Service's knowledge of philanthropy and continue to improve NPS's processes and rules to enhance collaborative partnerships**



- **Work has begun to address challenges related to NPS policies, procedures, and agreements that affect partners.** Director Orders 21 and 32, related to friends groups and cooperating associations respectively, are being considered for revision to clarify and improve the efficiency of NPS-partner processes. NPS is also working on a DOI University training module for all GS-9's and above to educate NPS staff on DO21 and to strengthen the culture of partnerships across the Service. And, NPF is funding two additional staff members in the Washington D.C. Area Support Office (WASO) Partnerships Office for three years to help manage grant agreements, vet donors, activate and approve corporate partnerships, and strengthen NPS-partner relationships.

### **Amplify the park partner community's resources to benefit national parks through a nationwide collective campaign**

- **The idea of a collective campaign is moving forward.** Planning was delayed due to the economic uncertainty of the last two years and now NPF is actively in discussions with close to 40 partners who have signed a Letter of Interest to explore the collective nature of a national fundraising campaign. NPF is working collaboratively with friends group leaders to codesign the campaign in ways that are beneficial to NPS, partners, and NPF. Advisory groups have been formed and pilot projects will allow partners to test concepts as to how they might work collaboratively to successfully position national parks as worthy of philanthropic support.

## 2022 recommendations

**The needs of the park partner community today suggest several priorities for the near future:**

### **A. Build NPS capacity through policy and procedure enhancements, targeted workforce training and hiring, and expanded public-private partnership opportunities**

The community sees NPS capacity constraints as a significant challenge. NPS staffing has shrunk over the last decade<sup>8</sup> while the number of visitors, park units, resource protection needs, and park partners have increased. Partners are diverse in nature and seek alignment around a common vision with NPS that can lead to greater public engagement and support as well as growth and success of partners. In addition to embracing a common vision and increasing funding for NPS, there are a few areas where partners and parks can work together:

- **Refresh Director's Order 21 and Reference Manual 21 to empower partners through greater engagement and clarity:** Director's Order 21 was last updated in 2016. The partner community has grown considerably since then – both in fundraising expertise as well as becoming more deeply involved in park operations. Partners suggest raising the threshold for philanthropic agreements, updating donation review and gift acceptance guidelines to align partner expertise with the right threshold levels, streamlining philanthropic partnership agreements, focusing

8. The number of NPS FTEs declined almost 18% between 2010 and 2020. 2020: [National Park Service \(NPS\) Appropriations: Ten-Year Trends, Page 14](#). 2010: [FY 2011 Greenbook, Overview-2](#).

on multi-year goals rather than one-year workplans, and allowing for partner engagement in design and construction where possible, among others.

- **Accelerate targeted workforce training and hiring practices:** With limited staff capacity at NPS compared to a decade ago, the partner community sees value in increasing efficiency in NPS hiring policies and practices, training new NPS hires on partner organization roles and the value of philanthropy, and extending recruitment strategies to individuals of diverse backgrounds. NPS and partners should work collaboratively to identify creative solutions to workforce issues, such as employee housing. These hiring priorities may be even more important as the Inflation Reduction Act funding becomes available. In addition, partners may be able to directly support positions that extend beyond what NPS can do themselves.
- **Expand public-private partnerships:** Recognizing that partners can offer unique services beyond NPS's core mission, the partner community seeks additional public-private partnerships to support NPS's park management, professional development, employee support structures (e.g., housing), and other services. There are many examples of past successful public-private partnerships, such as the Gettysburg Foundation's work to enhance the Gettysburg National Military Park (PA) visitor experience through its visitor center and interpretive offerings, or Rock Creek Conservancy's support to Rock Creek Park (Washington, D.C.) to promote equitable forest

and climate resilience. There are also ongoing efforts to creatively use public-private partnerships to engage some of the community's most pressing challenges, such as the recent effort to address housing in Acadia (ME).

### **B. Facilitate cross-partner learning and extend support to meet current partner needs**

Partners are eager to learn and collaborate. The community can build partner capacity and connections through the following activities:

- **Amplify fundraising support for innovative projects and partner requests:** NPF should continue to support partners with the fundraising and communications tools they request (e.g., digital fundraising, small gift community fundraising, donor prospecting), while elevating creative and innovative work in the field. NPF should also continue to support partner groups through capacity building efforts via its *Strong Parks, Strong Communities* program.
- **Support partners' work to create diverse, equitable, and inclusive organizations.** NPF can build on progress to date by providing tools and trainings to help organizations achieve their DEI goals (e.g., increase board and leadership diversity, build more inclusive organizational practices and culture, expand justice and equity-related programming, strengthen outreach to indigenous communities and communities of color, and connect with peer organizations to share learnings).

## RECOMMENDATIONS

➤ **Extend the Friends Alliance’s reach:** The Friends Alliance can build on its recent Executive Director appointment and conduct thoughtful strategic planning to assess where FA is now and where it would like to be in 3-5 years. In addition to creating opportunities for partners to learn from each other such as at the annual in-person autumn meeting, the Friends Alliance can facilitate additional NPS-partner sessions to share both agency and partner priorities, further fostering collaboration.

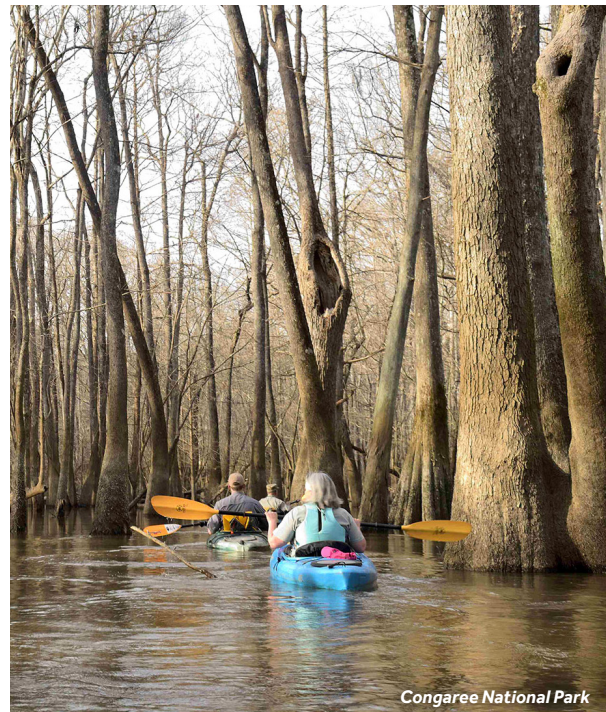
➤ **Pursue a national collective campaign:** As described in the 2020 report, there remains value in a national campaign to magnify community needs and develop resources for the community as a whole. Using one voice and a core set of national philanthropic goals aligned with NPS’s priorities can amplify the community’s impact. A national call for shared needs can accelerate partner goals at the local level.

### C. Tackle tomorrow’s big issues, today

Park partners demonstrated remarkable resilience in the face of a global pandemic. Opportunity remains to learn and prepare for the next challenge – before it impacts the nation’s parks.

➤ **Explore establishing a new virtual center to anticipate the challenges of tomorrow** and collaboratively develop, pilot, and scale solutions to those challenges. NPF is in the early stages of pursuing a “think-and-do” tank in partnership with NPS and the partner community, drawing in expertise from the

private sector where relevant. It could involve thought leadership, conferences, or working groups. It could further innovative practices on climate change, visitor use management, building the next generation of park users, telling America’s diverse stories, and other opportunities parks and partner organizations face. It could also monitor environmental, tourism, technological, and economic trends relevant to national parks and identify resources and technologies to equip national parks to address future challenges.



Congaree National Park

# Appendix A: Acknowledgements



**More individuals and organizations than can be named contributed to this report.**

Thank you to the primary National Park Foundation team – Dieter Fenkart-Froeschl, Deb Yandala, Sarah Unz, and Will Shafroth – for your guidance, thought partnership, and commitment. Thanks as well to the many others at NPF who contributed to this work.

We appreciate the partnership from Reginald Chapple and Karyn Ferro at the National Park Service and Frank Dean and Katie Nyberg from the Friends Alliance Steering Committee, as well as those who informed this year’s survey and approach by participating in interviews.

Finally, thank you to the many partner organizations who took the time to complete the survey: you made this report possible.

# Appendix B: Glossary of Terms

## **Cooperating Association:**

A category of park partner that primarily provides education, products, or services to national park visitors through retail sales and other channels. Cooperating associations may provide philanthropic or in-kind support to parks as part of their cooperating agreements.

## **Coordinating Entity:**

A category of park partner that is designated, often by Congress, as the entity responsible for maintaining a national heritage area, national trail, or national river.

## **Director's Order 21 (DO-21):**

The NPS guide to employees regarding philanthropic partnerships and the acceptance of support from the private sector.

## **Director's Order 32 (DO-32):**

The NPS guide to managers and staff regarding partnerships with Cooperating Associations. DO-32 helps define and clarify the roles of NPS and Cooperating Associations to strengthen mission alignment.

## **Form 990:**

A tax return form that most registered 501(c)3 nonprofit organizations are required to file and make public each tax year. It provides basic financial information about the organization, including data on revenue and expenses. Organizations regularly earning under \$50,000 in revenue are typically not required to file a Form 990.

## **The Friends Alliance:**

A coordinating body for friends groups and other organizations working in partnership with national parks, primarily providing community organization and networking opportunities.

## **Friends Group:**

A category of park partner that primarily provides philanthropic and in-kind support to parks.

## **NPF:**

The National Park Foundation, the official charitable partner of the National Park Service, generates private support and builds strategic partnerships to protect and enhance America's national parks for present and future generations.

## **NPS:**

The National Park Service, a US government agency within the Department of the Interior that is responsible for the administration of national parks and other natural and historical resources.

## **Other Organization:**

A category of park partner that includes service corps organizations, environmental and historical education partners, land trusts, and miscellaneous other partners.

## **Parks:**

Used in this report to refer to all national parks; national designations such as national heritage areas, national rivers, and national trails; and affiliated national park resources that partners work to support.

# Appendix C: Methodology

## Overview

We used qualitative and quantitative methods to inform the findings and recommendations in the 2022 Park Partners Report. We first surveyed park partners to gather data on a range of issues, including financial figures in fiscal year 2021. Knowing our survey reached only a sample of the park partner community, we also gathered publicly available IRS 990 tax returns to supplement survey financial data with additional information about organization revenues and expenses. Together, survey and Form 990 data allowed us to make estimates, especially with respect to financial data, about the park partner community as a whole.

## Survey

We launched the survey in June 2022 and requested participation from the 470 organizations we had identified as park partners. Survey questions focused on partner successes, challenges, support to NPS, and overall financials in the 2021 fiscal year. Many of the questions were sourced from the 2020 report survey to track

changes over time, though we added several new questions (e.g., board and leadership diversity) informed by partner interviews conducted in advance of the survey. These interviews helped identify key areas to explore in the report. For the complete list of survey questions, see Appendix D. 134 organizations responded to the survey with some variation by question.

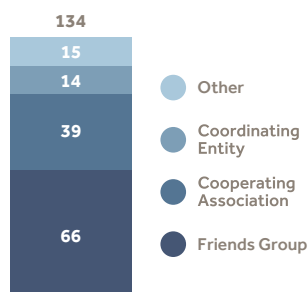
## Form 990 Analysis

To estimate the total revenue and support to NPS from the park partner community, we supplemented survey data with publicly available data for those organizations that did not respond to the survey. Following the approach taken for the 2020 report, we collected Form 990s for as many organizations as possible to gather data on revenue, expenses, employees, and volunteers. Organizations that generate under \$50,000 in annual revenues are generally not required to file a form 990, so no form 990 is available for these organizations.

Notably, the IRS had not yet released the bulk of 2021 990s, so we collected 2020 990s and extrapolated data to form 2021 estimates, detailed below. Due to extended reporting deadlines during the pandemic and changes in the IRS online database, there were fewer available 2020 990s than there were 2019 990s used in the 2020 Park Partners report. We supplemented 990s sourced from the IRS database with 990s from third party sources such as GuideStar, ProPublica, and Charity Navigator. In total, we collected 204 2020 Form 990s. 152 of those were for organizations that did not respond to the survey.

**FIGURE 13: SURVEY RESPONSES BY CATEGORY**

*Number of surveyed organizations responding*



## Estimating 2021 Park-Related Revenue and Support to NPS

We used a combination of survey and Form 990 data to estimate organizations’ 2021 revenue related to parks, as well as their total support to NPS. We first asked survey respondents to provide 2021 park-related revenue and support to NPS and used those figures for organizations who supplied them.

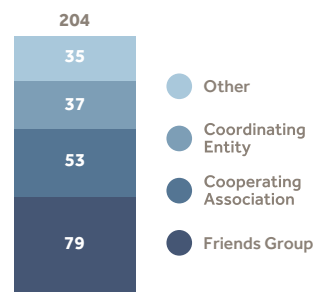
For organizations who did not respond to the survey, we used 2020 Form 990s to create 2021 estimates. We first used 2020 total revenue and expenses reported on 990s to estimate *park-related* revenue and support to NPS (i.e. an organization may have \$1 million in expenses, but only spends 10% of that on support to NPS). We used the average percentage of work related to NPS by organization type from the 2020 report for an apples-to-apples comparison (Figure 15).

For cooperating associations, we used the percentage of revenue contributed, reflecting a conservative assumption that cooperating associations’ contributed dollars are likely to be spent in support of NPS, where earned revenue may not be. For each organization, we then applied the appropriate category average to the 990 total revenue and expenses figures. This resulted in an estimate of the total revenue and expenses for each organization *directly related to parks*.

We then applied growth rates to the 2020 figures to estimate ranges of 2021 total revenue and support. A range allows us to provide both a highly conservative and less conservative estimate,

**FIGURE 14: 2020 990 FORM AVAILABILITY BY CATEGORY**

Number of organizations with 2020 990s received



**FIGURE 15: PERCENT OF WORK SUPPORTING NPS BY CATEGORY**

CATEGORY	AVERAGE PERCENT OF WORK SUPPORTING NPS
Cooperating Association	50% (contributed percentage used)
Coordinating Entity	72%
Friends Group	59%
Other	13%

understanding the nature of the analysis makes it difficult to identify a single number with a high degree of confidence. We used a conservative assumption of zero growth from 2020 to 2021 to determine the low-end of the range, despite data suggesting groups have grown overall. To determine an upper-bound figure, we calculated an average 2020-2021 growth rate by organization type using organizations that provided 2021 data in the survey and had 2020 Form 990 data available. For “other” organizations, we used the full sample average due to a very small category sample size.

**FIGURE 16: UPPER-BOUND GROWTH ESTIMATES**

*Average Change in Revenue and Expenses 2020 to 2021 by Category\**

<b>CATEGORY</b>	<b>AVERAGE PERCENT CHANGE IN REVENUE 2020 TO 2021</b>	<b>AVERAGE PERCENT CHANGE IN EXPENSES 2020 TO 2021</b>
Cooperating Association	90%	20%
Coordinating Entity	94%	6%
Friends Group	63%	6%
Other**	82%	15%

\*Averages weighted by organization size

\*\*Upper-bound growth estimates for "other" organizations use the average across categories due to a small category sample size



# Appendix D: Survey Questions

## Basic information

1. Please provide the following identifying information about yourself:
  - First Name
  - Last Name
  - Work Email Address
2. Please provide the following identifying information about your organization:
  - Organization Name
  - Federal Employer Identification Number (if available, otherwise enter NA)
  - Your Position at Organization/Job Title

**Throughout the survey we use “NPS” to refer to the National Park Service and all NPS units and designations (<https://www.nps.gov/aboutus/national-park-system.htm>). National park units include parks, monuments, historic sites, battlefields, etc. National park designations include heritage areas, trails, wild and scenic rivers, etc.**

3. What type of NPS units or designations does your organization support? Select all that apply.
  - National Park Unit
  - National Heritage Area
  - National Trail System
  - National River System
  - Other (please describe)
4. Which of the following best describes your organization? Select all that apply.
  - Friends Group
  - Cooperating Association
  - Service Corps
  - Land Trust
  - Management entity for a trail/river/heritage area
  - Other (please describe)
5. Do you have any formal contractual relationships with NPS? Select all that apply.
  - Philanthropic Partnership Agreement
  - Cooperative Agreement
  - Sell products or services within or related to parks (distinct from a cooperative agreement or philanthropic partnership)

- Official coordinating entity for river trail or heritage area
  - Partnership design and construction agreements
  - NPS grant agreements
  - We do not have any formal contractual relationships with NPS
  - Other (please describe)
- 6.** Does your organization work exclusively with NPS? [Skip question 7 if yes]
- Yes
  - No
- 7.** What percentage of your organization's work would you estimate pertains to NPS? [Estimate one to 100]

### Organizational priorities

- 8.** What was your biggest national park-related success over the past two years?
- 9.** As you envision the next 3-5 years, what are 1-3 of the most exciting projects that you and your superintendent(s) plan to make a priority?
- 10.** What are your organization's biggest limitations to maximizing your impact on NPS? Select all that apply. For each option selected, you are welcome to add any information or detail you would like to share.
- Lack of fundraising capacity
  - Lack of internal organizational capacity and staffing for programming, volunteer management, services, etc.
  - Lack of community or partner relationships
  - Lack of sufficient NPS staff to effectively work with your organization
  - NPS policies regarding contracting, hiring, partner roles, etc. that prevent your organization from pursuing its priorities
  - Significant differences between your organization's priorities and goals and the priorities and goals of NPS
  - Other (please describe)

### Organizational capacity

- 11.** Which of the following best describes the position held by the leader of your organization? Please select one.
- Full-time paid

- Part-time paid
- Full-time volunteer
- Part-time volunteer
- N/A

- 12.** How many years has the leader of your organization been in that position?
- 13.** How many staff members did your organization employ on June 1, 2022? If your organization works on projects or programs unrelated to NPS, please estimate for work related to NPS. [count by: Full-time paid, Part-time paid]
- 14.** How many net staff do you plan to add in the next 12 months? (Use negative numbers for projected staff reductions.)
- 15.** How many full-time equivalents did your organization have focused on fundraising as of June 1, 2022?
- 16.** How many board members does your organization have? Enter NA if your organization does not have a board.
- 17.** How many years are your board term limits? [1, 2, 3, 4, 5+, Our board does not have term limits, N/A]
- 18.** Please share the following board diversity statistics. What percentage of your board are...
- Black, Indigenous, or people of color?
  - Women or non-binary?
  - 50 years old or younger?
- 19.** What percentage of your organization's leadership are
- Black, Indigenous, or people of color?
  - Women or non-binary?
  - 50 years old or younger?

## Tools for organizations

- 20.** In which of the following areas would your organization benefit from training, new tools, or support over the next twelve months? Select up to five. For each option selected, you are welcome to add any information or detail you would like to share.
- Diversity, equity, and inclusion education, training or coaching

- Fundraising/resource mobilization
- Governance (board engagement, composition, structure, priorities)
- Marketing/communications/branding
- National Park Service policies and procedures
- Organizational culture
- Programming and service provision (education, conservation, citizen science, etc.)
- Strategy (vision, goals, strategies, business plan, success metrics)
- Volunteer management, partnerships, and/or community outreach
- Other (Please describe)

**21.** The National Park Foundation, National Park Service, and the Friends Alliance want to strengthen the collective efforts of the national park partner community. What suggestions do you have for us to do that more effectively? Please answer as many as are applicable to you. For example, are there enhancements NPS could make to make your partnership more effective or efficient? If you are a grant recipient of the National Park Foundation, we also welcome comments on our grant process. [Text box for each]

- National Park Foundation
- National Park Service
- Friends Alliance
- General/other

### Financial metrics

**22.** Were your organization's 2021 revenues more than \$50,000? If your organization works on projects or programs outside of NPS, please estimate for work related to NPS specifically. [If no, ask only for total revenues and then skip the remainder of the questions in the financial metrics section]

**For all of the following questions, please use data for your fiscal year ending in calendar year 2021. If you do not yet have final or near-final data, please leave the fields blank. It may be easiest to answer these questions if you have your most recent IRS Form 990 and audited financials in front of you. Please enter whole numbers with no dollar signs, commas, or decimals.**

**If your organization works on projects or programs outside of NPS, please estimate for work related to NPS specifically.**

### Revenue

**23.** Please provide the following information about your organization's revenue related to NPS for the fiscal year ending in 2021. Enter a zero if you have no revenue in that category. Please also include your estimates for revenue for the fiscal year ending in 2022.

## APPENDIX D: SURVEY QUESTIONS

CATEGORY	2021	2022 ESTIMATE
Total revenue		
Contributed revenue – Government grants and other government revenue		
Contributed revenue – All other contributed sources, including private foundations, individuals, corporate sources, and net revenue from fundraising events		
Earned revenue – Net income from sale of inventory		
Earned revenue – All other earned sources, including program services/fee-for-service		

### Support to the National Park Service

**24.** Did you provide at least \$50,000 in financial or in-kind support to the National Park Service in your fiscal year ending in 2021? Note: volunteer and service corps hours should not be included here [If no, skip the following question]

**25.** Which of the following types of support did your organization provide to the National Park Service in your fiscal year ending in 2021? What do you expect your estimated support to NPS to be for the fiscal year ending in 2022? [enter amount/estimated value]

CATEGORY	2021 ACTUAL	2022 ESTIMATE
Total aid to the National Park Service		
Direct funds to NPS		
Contributed revenue – All other contributed sources, including private foundations, individuals, corporate sources, and net revenue from fundraising events		
In-kind contributions to NPS including land, conservation programs, and education programs (volunteer hours detailed below)		

**26.** What were your organization's total expenses for your fiscal year ending in calendar year 2021?

**27.** What is the size of your organization's endowment as of March 31, 2022?

- We have no endowment

- Up to \$500,000
- Between \$500,000 and \$1 million
- Between \$1 million and \$10 million
- More than \$10 million

**28.** Does your organization work with volunteers? Exclude board members.

- No
- Yes, and the number of volunteer hours that individuals affiliated with your organization contributed to NPS in 2021 is: [Text Box]

## Effects of COVID-19

**29.** In what ways has your organization adopted **permanent changes in response to COVID-19**?

**Select all that apply.**

- Commenced new activities or offerings to diversify revenue sources
- Changed business model (e.g., eliminated programs, increased focus on philanthropic or individual giving)
- Developed new partnerships
- Adopted hybrid or full-time remote work
- Shifted to virtual events
- Shifted to provide people experiences and access to parks and places virtually
- Other (please describe)

**30.** Please add any relevant detail, successes, or learning you would like to share regarding the above selections.

**31.** How do you expect your financial contributions to NPS over the next year will compare to pre-pandemic levels?

- We expect our contributions to exceed pre-pandemic levels
- We expect our contributions to meet pre-pandemic levels
- We expect our contributions to be less than pre-pandemic levels

**32.** How do you expect the current inflationary market to impact your organization over the next 12 months?

- We expect to reduce staffing
- We expect to increase compensation
- We expect project costs to increase
- We expect a need for greater unrestricted dollars
- Other (please specify)

## 7. Impact on parks

### Activities with the National Park Service

**33.** In which of the following activities or functions is your organization engaged with NPS? Select all that apply. [Organized by category]

**Education**

- Youth education
- General education
- Other education

**Conservation**

- Land preservation
- Scientific studies
- Species protection
- Other conservation

**Restoration**

- Historic structure rehabilitation
- Trail restoration
- Habitat restoration
- Waterway restoration
- Removal of invasive species
- Other restoration

**Construction**

- Public facilities construction/maintenance
- New infrastructure development (e.g., park staff housing, roads)
- Trail construction
- Other construction

**Culture**

- Diversity, equity, inclusion, and racial justice
- Other culture

**Other (please describe)**

**34.** Are there other areas in which your organization is interested in engaging with NPS?

**35.** If you could run a session or webinar with NPS to teach them something about park partners, what would it be?