Friends of Santa Cruz State Parks
Real-Time Strategic Plan

TABLE OF CONTENTS

Map of Parks Operated in Partnership with Friends ........................................ 02
Introduction ...................................................................................................... 03
Acknowledgements .......................................................................................... 05
Vision & Mission .............................................................................................. 07
Environmental Scan & Key Implications for Friends ...................................... 08
Values ................................................................................................................ 12
Opportunity Matrix Criteria ........................................................................... 13
Sample Opportunity Matrix ........................................................................... 14
Big Questions from the Retreat ....................................................................... 15
Progress Updates .............................................................................................. 17
History of Updates ............................................................................................ 20
Friends of Santa Cruz State Parks (Friends) is a vital partner with California State Parks, creatively working to ensure our cherished local parks and beaches are thriving and available to all. Friends’ innovative and collaborative community partnership provides support and investment for education, equity and inclusion, conservation, facilities improvements, historic preservation and cultural events.
Friends of Santa Cruz State Parks
Strategic Planning Process – 2018

Introduction

2018 marked the final year of Friends of Santa Cruz State Parks’ three-year strategic plan. Early that year Friends’ board and staff recognized that we were entering a time of great opportunity with the coming of a new operating agreement with State Parks, which would bring about a substantial expansion of Friends’ role. We identified the need for a responsive strategic plan to serve as a guide for actualizing the opportunities before us. Friends decided to embrace a more dynamic planning process: Real-Time Strategic Planning.

Why Real-Time Strategic Planning

Friends recognized the traditional strategic plan model has significant challenges. For example, it creates the expectation that strategies fit within a rigid timeline, requires forecasting the future from a snapshot in time, and expects strategies will all be completed before the end of the plan period. The staff and board have experienced all of these challenges, most notably, setting goals in the strategic plan that were achievable before the end of the three-year period.

Real-time strategic planning is a radically different method for approaching the process of acting strategically within a nonprofit organization, and is described in the book “The Nonprofit Strategy Revolution: Real-Time Strategic Planning in a Rapid-Response World” by David La Piana. Certain aspects of real-time strategic planning replicate traditional planning processes, such as building on a shared mission and vision, and establishing a foundation to take action based on common understandings and agreements. Aspects that differ from a traditional model include:

- **Big Questions** - Rather than identifying static, overarching goals for a set period of time, opportunities or challenges are identified that are recognized at the beginning of the strategic planning process. They also may arise over time. These are referred to as Big Questions, and are identified and addressed as they become priorities.

- **Opportunity Matrix** - Different strategies to address a Big Question are weighed using Friends’ values as a strategy screen in the format of an Opportunity Matrix. This tool allows the board and staff to visualize and rate which strategies best fit with our values.

- **Expanded Participation** - Staff and park partners are included in pre-work such as surveys to understand participants’ priorities and vision for Friends. This helps inform the strategic planning retreat. Staff and park partners will continue to be engaged in a meaningful, integrated way as we grapple with strategies to address the Big Questions.
Most importantly, the board and staff of Friends recognized that real-time strategic planning is a system that supports on-going and frequent consideration and discussion of strategies, and allows for flexible and nimble decision-making. Given our capacity and resources, we can be more responsive as new opportunities arise, and be flexible as we assess and take on projects, as well as decide to make investments in our parks and organization.

**Process**

During 2018, we learned about the real-time strategic planning model, reached agreement to test it, and adjusted the model to fit our particular circumstances and ways of working together. One of the key benefits we have already discovered about the new model is that it encourages much more board and staff discussion at board meetings. This moves us away from just reporting on progress towards objectives to providing input on what are the most important opportunities and brainstorming strategies to address the opportunities.

The real-time strategic planning process Friends is implementing incorporates elements of traditional strategic planning: revising and renewing our vision and mission statements, conducting an environmental scan and bringing board, staff and park partners together for an all-day retreat.

At the retreat in October 2018, rather than taking the traditional path of identifying the key objectives for the next three years, we talked about the Big Questions, i.e. what are the most important challenges and opportunities for the organization right now. We also spent time discussing our values, as we will use these to measure potential strategies through the Opportunity Matrix, a key step in the model for acting strategically.

Our next steps are to assign the Big Questions to committees and work groups, which will take on the job of refining and clarifying the Big Questions, proposing strategies to address the Big Questions and choosing the initial strategy or strategies to pursue based on our values. Once that is done we will begin implementing the selected strategies, and repeat the process when new Big Questions arise.

**Outcomes**

Beginning in 2019, this document will be updated and additions made as new Big Questions arise and strategies are implemented. We anticipate that while some Big Questions will take multiple years to be completely addressed, others may only be in process for a few months. Our intention is to bring progress reports to the board and update our progress on Big Questions on a regular basis.

We are excited about the path ahead, with a new way of acting strategically to ensure that our parks and beaches are thriving and available to all.
Acknowledgements
In grateful appreciation to:

Board Development Committee
The Friends Board Development Committee, whose leadership helped navigate our board, staff and State Parks team through a thoughtful year-long introduction to Real-Time Strategic Planning, brought out our best ideas at the Strategic Planning Retreat, and helped translate that work into a living document to guide us through the opportunities ahead.

And special thanks to Dorian Seamster, who introduced our organization to real-time strategic planning, inspired by the book *The Nonprofit Strategy Revolution: Real-Time Strategic Planning in a Rapid-Response World* by David La Piana.

Maggie Mathias, Board Development Chair, 2017 & 2018
Dorian Seamster, Board Development Chair 2019
Board members: Nikolara Dunbar-Jansons, Ann Lauten Fay, Ed Newman, Curt Simmons
Staff: Peg Danielson, Taylor Dial, Bonny Hawley

Friends Board
The Friends Board who embraced the new model of Strategic Planning and welcomed full staff participation in the process.

Curt Simmons, Board Chair, 2017 & 2018
Ann Lauten Fay, Board Chair 2019
ACKNOWLEDGEMENTS

State Parks Partners

The State Parks Partners who provided invaluable insights during the planning phase that helped guide our work.

- District Superintendent Chris Spohrer
- Chief Ranger and Cooperating Association Liaison Mike McMenamy
- Sheila Branon, Elizabeth Hammack, Linda Hitchcock, Mark Hylkema, Joanne Kerbavaz, Terry Kiser, Felipe Jauregui

Retreat Participants

The Friends board and staff and State Parks staff who participated in the day-long retreat and so generously shared their heart and creativity in support of thriving State Parks.

- Peter Gaarn, Retreat Facilitator

Real-Time Strategic Plan Document Production

- Bill Maxfield, Jennifer Murray, Eva Zeno, Kiara Holland, Nina Rogers
- Bonny Hawley, Audrey Mendiola-Arriola, Anne Weidlich

And finally, our newest Friends staff who will help carry these plans forward

- Crissy Canlas, June Heaton and Mikelle Jayne
Vision & Mission

Vision
Our local parks and beaches: thriving and available to all.

Mission
Friends of Santa Cruz State Parks (Friends) is a vital partner with California State Parks, creatively working to ensure our cherished local parks and beaches are thriving and available to all. Friends’ innovative and collaborative community partnership provides support and investment for education, equity and inclusion, conservation, facilities improvements, historic preservation and cultural events.
Environmental Scan & Key Implications for Friends

**Outside Trends**
- Population growth and shifts
- Increased visitations
- Aging infrastructure with increased pressure
- State Park staffing challenges
- Climate change impacts
- State Parks bureaucracy

**Political/Economic Climate**
- Expanding regional stewardship partnerships
- Friends has stable funding source (kiosks)
- Outside revenue impacts & opportunities
- Competitive staff wages & benefits
- New state leadership? (Governor, State Parks Director)

**Emerging Customer Needs**
- Resurgence in the public getting outdoors
- Trend of active health/green space and people wanting to get out in nature
- Park usage in increasing and will continue to rise. How can we leverage the increased usage to influence park goer’s hearts and minds? How can we balance between increased usage and resource protection?
- Increasing pressure for new recreation opportunities
- Continued and increasing challenge of making the Parks welcoming for all.

**Internal Trends** (Friends & State Parks)
- Positive relationships between State Park Staff and Friends
- Co-management agreement creates opportunities and challenges
- Increasing visitor diversity and fostering a sense of stewardship & belonging to all Californians
- Growing partnerships
- Increasing Friends staff capacity and support
- Renewed focus on cultural & historic resources

**Uncertainties**
- Economy – next recession or correction
- Current fed administration
- Possible repeal of Prop 6
- Income inequality creates differences in expectations in park experiences
- Public’s unwillingness to accept new taxes
- Amount and use of funding from cannabis taxes
- Less national will & support for parks and forests
- New governor may approach State Parks differently than previous administration

**Technology Factors**
- New State Parks operational system (R2S2) is in process.
- Using technology to enhance the visitor experience
- Impact of social media to bring more diverse visitors into the parks
Key Implications for Friends

1. Co-management agreement establishes new ways of doing business and new opportunities.
2. Significant and steady revenue provides opportunities to have a major impact.
3. Increasing use of the parks coupled with deferred maintenance is adding pressure on staffing, maintenance, security, resource protection, etc.
4. The rollout of the new State Parks operational system (R2S2) has big operational implications (i.e., Friends’ kiosk infrastructure will be replaced by State Parks Equipment, changes in how funds are processed and accounted for resulting in possible delays in receipt) as well as opportunities to increase revenue.
5. Staffing capacity and retention for Friends and State Parks is a major challenge.
6. Diversity, access and equity are important drivers for Friends’ board and staff, however there are different ideas about what those words mean and how to realize them.
## 1 | Outside Trends

**Population growth and shifts**
- Need for more natural open spaces as places of refuge & restoration
- Increasing diversity, cultural sensitivity
- Pressure from homelessness, crowding, illegal camping

**Increased visitations**
- Non-traditional users/first time visitors

**Climate change impacts**

**CSP bureaucracy**

**Aging infrastructure with increased pressure**
- Issues with aging facilities and environmental impacts on parks and structures

**State Park staffing challenges**
- Cuts to positions
- Housing costs
- Low wages
- Limited overtime
- Retention and high turnover

## 2 | Political/Economic Climate

**Expanding regional stewardship partnerships** expanding

**Friends has stable funding source** (kiosks)

**Competitive staff wages & benefits**

**New state leadership?**
- Governor
- State Parks Director

**Outside revenue impacts & opportunities**
- Parking capacity
- Economy
- Fed & State support
- State propositions
- Tax revenues

## 3 | Internal Trends (Friends & State Parks)

**Positive relationships** between State Park Staff and Friends

**Co-management agreement** creates opportunities and challenges

**Increasing visitor diversity and fostering a sense of stewardship & belonging** to all Californians:
- Kids2Parks
- Mole & Mariachi

**Increasing Friends staff capacity** and support

**Growing partnerships**
- Land Trust
- Sempervirens
- Community Based Organizations
- Other counties

**Renewed focus on cultural & historic resources**
- Castro Adobe
- Wilder structures
4  Technology Factors

New State Parks operational system (R2S2) is in process. We need to evaluate and mitigate impacts on our operation.
Using technology to enhance the visitor experience
- Mobile apps
- Credit cards
- Apple Pay

Impact of social media to bring more diverse visitors into the parks
- Marketing
- Smart phones
- Apps

5  Emerging Customer Needs

Resurgence in the public getting outdoors
Trend of active health/green space and people wanting to get out in nature
Park usage increasing and will continue to rise
How can we leverage the increased usage to influence park goer's hearts and minds?
How can we balance between increased usage & resource protection?

Increasing pressure for new recreation opportunities
- Mountain bike trails
- Hiking trails
- Ball fields
- BBQ
Continued and increasing challenge of making the Parks welcoming for all

6  Uncertainties

Economy – next recession or correction
Current fed administration
Possible repeal of Prop 6
Income equality creates differences in expectations in park experiences
Public's unwillingness to accept new taxes

Amount and use of funding from cannabis taxes
Less national will & support for parks and forests
New governor may approach State Parks differently than previous administration
## Values

<p>| | |</p>
<table>
<thead>
<tr>
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<tbody>
<tr>
<td>1</td>
<td>Innovation</td>
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<tr>
<td></td>
<td>Friends is a pioneer of creative strategies to solve the complex, inter-related social, economic and environmental challenges that face state parks.</td>
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<tr>
<td>2</td>
<td>Kindness</td>
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<td></td>
<td>Friends respects the dignity of all beings (human, flora, fauna) and brings compassion and civility to all our interactions.</td>
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| 3 | Accountability |
|   | Friends holds ourselves responsible for setting shared goals, investing resources efficiently and effectively, and evaluating our efforts and progress. |

| 4 | Equitable Support |
|   | Friends serves all state parks and beaches in the Santa Cruz District, which includes all parks in Santa Cruz County and Coastal San Mateo County. |

| 5 | Diversity, Equity & Inclusion |
|   | All visitors feel welcomed and have equal opportunities to access and enjoy state parks’ natural, cultural and historic resources. Friends equally encourages all community members to participate in achieving Friends’ mission, through board service, membership, employment, volunteering, and attending events. |

| 6 | Sustainable Stewardship |
|   | Friends acts to ensure the health and preservation of the organization and the future of state parks. |

| 7 | Advocacy |
|   | Friends advocates for our values on the local, state and national level on issues pertaining to our mission. |

| 8 | Teamwork |
|   | Friends values a team environment based on trust and contribution from all board members, staff and volunteers. |
Opportunity Matrix Criteria

The Opportunity Matrix is a screening tool to examine the relative value of strategies, programs and activities under consideration by the organization.

a. Aligned with Friends’ mission.
b. Aligned with State Parks’ partnership.
c. Sustains the long-term financial health of Friends.
d. Effectiveness of strategy can be measured.
e. Improves/doesn’t diminish our ability to provide high-quality visitor experiences for all visitors.
f. Builds/sustains our position as a community leader in park issues.
g. Protects all of our natural, cultural, historic, recreational and human resources.
h. Promotes the use of state parks by all visitors, particularly those who have been historically underserved.
i. Balances the needs of parks, beaches and staff district-wide.
j. Promotes/maintains Friends’ positive and inclusive team work environment.
k. Fosters stewardship of our local resources by visitors.
l. Encourages diverse community participation in the development of Friends’ programs, activities, and organization.
m. Fits within existing Friends/State Parks capacity, or additional capacity can be built.
## Sample Opportunity Matrix

Rank each option related to specific criteria: high 🟢 medium 🟡 or low 🟠

<table>
<thead>
<tr>
<th>BIG QUESTION</th>
<th>POTENTIAL STRATEGY</th>
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<tr>
<td></td>
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<tr>
<td>(Criteria)</td>
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**SCORE:**
## Big Questions From Retreat

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>COMPONENTS</th>
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<tbody>
<tr>
<td><strong>CAPACITY</strong></td>
<td><strong>A</strong> What can Friends do to work towards optimum working conditions for a growing staff?</td>
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<td></td>
<td><strong>B</strong> How can we ensure adequate staffing in all departments and levels of Friends?</td>
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<td></td>
<td><strong>C</strong> How can we work towards increased leadership development, cross-training and resilience for our staff?</td>
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<td></td>
<td><strong>D</strong> How can Friends help State Parks build local staff capacity?</td>
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<tr>
<td><strong>HISTORIC BUILDINGS</strong></td>
<td><strong>E</strong> How can we develop and implement a plan for saving historic buildings throughout the District?</td>
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<tr>
<td><strong>MAINTENANCE</strong></td>
<td><strong>F</strong> Maintenance Category</td>
</tr>
<tr>
<td><strong>PRIORITIZING PROJECT FUNDING</strong></td>
<td><strong>G</strong> How can we improve our system for funding projects to ensure highest priorities are being addressed?</td>
</tr>
<tr>
<td><strong>EQUITY, ACCESS, BALANCED ADDRESSING OF GROWING COMMUNITY NEED</strong></td>
<td><strong>H</strong> How do we ensure that park services meet the needs and interests of a broad range of community members?</td>
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<tr>
<td></td>
<td><strong>I</strong> How do we meet the growing and expanding needs of our community while ensuring safety, access, quality of experience?</td>
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<tr>
<td><strong>BOARD</strong></td>
<td><strong>J</strong> How can we improve our board recruitment strategy to meet goals for diversity, skill sets and perspectives?</td>
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<tr>
<td></td>
<td><strong>K</strong> What is the most effective structure for doing the work of the board?</td>
</tr>
<tr>
<td><strong>OPTIMIZING CO-MANAGEMENT AGREEMENT</strong></td>
<td><strong>L</strong> How can Friends optimize our partnership with State Parks under the new Co-Management Agreement, maintaining our nimble, responsive relationship?</td>
</tr>
<tr>
<td>Category</td>
<td>Process</td>
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<tr>
<td>Capacity</td>
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<tr>
<td>Historic Buildings</td>
<td>2</td>
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<tr>
<td>Maintenance</td>
<td>3</td>
</tr>
</tbody>
</table>

**Big Questions Progress Updates: February 12, 2020**

1. **Capacity**
   - **A**: What can Friends do to work towards optimum working conditions for a growing staff?
     - **Executive Staff**
       - An internal initiative
         - Bonny has discussed next steps with Executive Director and State Parks staff.
   - **B**: How can we ensure adequate staffing in all departments and levels of Friends?
     - **State Parks**
       - We are focusing first on questions G, J and K.
   - **C**: How can we build local staff capacity?
     - **State Parks**
       - We are focusing first on questions G, J and K.

2. **Historic Buildings**
   - **E**: How can we develop and implement a plan for saving historic buildings throughout the District?
     - **State Parks**
       - We are focusing first on questions G, J and K.

3. **Maintenance**
   - **F**: How can Friends help State Parks build local staff capacity?
     - **State Parks**
       - We are focusing first on questions G, J and K.

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**Note:**
- The new offices have been operational since February 2019.
- There may also be a need for some outside HR advising.
### Big Questions Progress Updates: February 12, 2020 (continued)

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>COMPONENTS</th>
<th>COMMITTEE/PROCESS</th>
<th>NEXT STEPS</th>
<th>PROGRESS</th>
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<tbody>
<tr>
<td>4</td>
<td>G How can we improve our system for funding projects to ensure highest priorities are being addressed?</td>
<td>Finance Committee</td>
<td>Finance Committee work to create initial strategies</td>
<td>The Project Prioritization working group has met twice and another meeting is in process. Friends and State Parks worked together to apply for Proposition 68 funding for Deferred Maintenance Projects and Trail Upgrades.</td>
</tr>
<tr>
<td></td>
<td>H How do we ensure that park services meet the needs and interests of a broad range of community members?</td>
<td>Board Governance Committee</td>
<td>Board Governance Committee work on proposal for next steps</td>
<td><strong>H</strong> The Board voted in December to create an Equity Working Group.</td>
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<td></td>
<td>I How do we meet the growing and expanding needs of our community while ensuring safety, access, quality of experience?</td>
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<td><strong>I</strong> A working group was convened to study the future of the Mole &amp; Mariachi Festival. They recommended in part that Friends not produce the Mole &amp; Mariachi Festival and that the Santa Cruz Mission State Historic Park not be the venue; and the creation of a new Working Group to consider additional equity activities for populations across more parks. We are in the process of creating that new equity-focused working group once further progress is made on the Project Prioritization Working Group.</td>
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<tr>
<td>COMPONENTS</td>
<td>NEXT STEPS</td>
<td>PROGRESS</td>
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<td>BOARD</td>
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<tr>
<td>How can we improve our board recruitment strategy to meet goals for diversity, skill sets and perspectives?</td>
<td>Board Governance Committee work to create initial strategies</td>
<td>As a result of the work done by the Work of the Board Group, a number of changes were adopted to the Bylaws and Governance Manual, including new definition/duty statements for the Executive Committee and Board Governance Committee. A new policy regarding the creation, work and disbanding of strategic planning groups has been adopted. This working group will be recruiting for additional members and will be focused on the future of Park Advisory Committees. The first step in researching the Park Advisory Committee Members is to send a survey to interested parties.</td>
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| SURF | | |
| How can Friends optimize our partnership with State Parks under the new Co-Management Agreement, maintaining our nimble, responsive relationship? | SURF Committee work to create initial strategies as agreement is implemented | Co-Management is underway. The SURF Committee continues to work on a smooth transition and effective strategies for moving forward. A draft Operations Plan has been submitted to State Parks. |
History of Updates

1. Friends Board, Staff and State Parks Retreat held on October 27, 2018, at the Kimbro House, Castro Adobe State Historic Park
2. Vision, Mission, Values, Criteria – Adopted February 13, 2019
3. Progress Update – April 10, 2019
4. Progress Update – June 12, 2019
5. Progress Update – February 12, 2020