EXECUTIVE SUMMARY

HISTORY

Sequoia National Park and Kings Canyon National Park (collectively “SEKI”) are natural and historic icons in the national park system. Sequoia Parks Conservancy (SPC) is built on decades of support for SEKI by the Sequoia Natural History Association (SNHA) and the Sequoia Park Foundation (SPF). This legacy demonstrates a longstanding commitment and contribution to SEKI and its surrounding communities, including the U.S. Army Corp of Engineers site at Lake Kaweah.

Parks nationwide, including SEKI, are experiencing record visitation and unprecedented financial and management challenges. The opportunity and imperative for partner organizations and cooperating associations to play a significant role in the preservation, promotion, and success of national parks has never been greater.

SEQUOIA PARKS CONSERVANCY STRATEGIC STATEMENT

In service of its mission to support Sequoia and Kings Canyon National Parks, Sequoia Parks Conservancy will strengthen its operational, retail, and programmatic foundations, and add a robust philanthropy program to enhance the vitality of the organization and the mission of the parks.

SPC is in a period of opportunity, challenge, and growth. It has a bright future and is poised to meet new opportunities head on, elevating its impact in support of the wonders of Sequoia and Kings Canyon National Parks, Lake Kaweah, and the people and communities that touch these treasured places.

STRATEGIC PLANNING

Sequoia Parks Conservancy undertook a rigorous strategic planning process between October 2017 and April 2018, which focused on SPC’s next five years, 2018–2022.

The resulting strategic plan highlights key organizational, programmatic, and sustainability needs, as well as important areas for additional analysis and assessment.

The planning process included extensive internal research, interviews, and analysis of SPC organizational material, history, and ideas for the future. SPC’s staff, board, partners, leaders from peer organizations, and other supporters have informed the insights and framework of the focus areas, objectives, tactics, and actions detailed in this plan.
Both SPC and SEKI leadership are ready to take their collaboration to the next level. To seize this opportunity, SPC must be clear about how to engage with its partners, where to focus its efforts, and on which topics to say "no" or "not yet."

This strategic plan is a guide to SPC’s direction and intentions. It reflects the best thinking of the organization at the time it was created. However, it is a living document and intended to guide regular strategic decision making by SPC’s board and staff, in collaboration with key partners. The ability and willingness to revisit the plan’s objectives and actions is essential for success in the dynamic business landscape of park partnership.

Research was also conducted into how organizations similar to SPC have navigated related challenges. Specific learning from this process is detailed in the companion document *Learning from Peers*.

### STRATEGIC PLAN SUMMARY

<table>
<thead>
<tr>
<th>FOCUS AREA</th>
<th>STRENGTHEN SPC AS AN ORGANIZATION</th>
<th>DEVELOP A PHILANTHROPHY PROGRAM IN SUPPORT OF SEKI AND SPC</th>
<th>BUILD ON EXISTING RETAIL AND PROGRAM STRENGTHS</th>
</tr>
</thead>
<tbody>
<tr>
<td>OBJECTIVE</td>
<td>Become a stronger, more consistently governed, managed, and sustainable organization.</td>
<td>Develop a philanthropy program to increase funding for park priorities, support SPC/SEKI collaboration, and engage a broader community on behalf of SEKI and SPC.</td>
<td>Strengthen existing programs and retail operations as a priority while strategically assessing opportunities for retail growth and new program development.</td>
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</table>
| TACTICS                     | 1. Create a five-year vision statement  
2. Strengthen board governance and committee structure  
3. Invest in executive leadership and staff development  
4. Systematize and document business operations  
5. Redefine SPC’s membership program  
6. Diversify earned revenue opportunities | 1. Design a philanthropy program  
2. Systematize donor management  
3. Develop a fundraising plan  
4. Broaden the geographic approach to fundraising  
5. Strengthen communications and branding | 1. Streamline and systematize coordination and communication with partners, especially NPS  
2. Develop a decision-making process and map program choices to strategic priorities  
3. Expand and strengthen retail operations and related partnerships |
| NOTE                        | An impactful organization is strongly led, appropriately governed, and clearly executes operational details. | A professional fundraising organization is clear on its value proposition and engages with integrity and courage. | A robust organization integrates philanthropy with other activities to balance priorities. Don’t lose sight of what already works. |
Sequoia National Park and Kings Canyon National Park (collectively “SEKI”) are natural and historic treasures in the national park system and are prized among the many parks and protected areas in California. Over 95 percent of SEKI land is backcountry wilderness, a unique high sierra landscape that its visionary founders recognized the need to protect and manage under national park status.

After decades of impactful work, the Sequoia Natural History Association (SNHA) and the Sequoia Park Foundation (SPF) have merged to form the Sequoia Parks Conservancy (SPC). The legacy of its founding organizations demonstrates a longstanding commitment and contribution to SEKI and its surrounding communities.

The national park system is changing. Parks, including SEKI, are experiencing record visitation and unprecedented financial and management challenges. The opportunity and imperative for partner organizations and cooperating associations to play a significant role in the preservation, promotion, and success of national parks has never been greater.

Park partner organizations like SPC are becoming a stronger presence and important partner for the National Park Service (NPS) at sites across the country. They are a key connection point with park visitors and often provide important services, educational programs, and raise funds in support of park priorities.

SPC has the added commitment of being the cooperating association responsible for retail sales at several SEKI park sites. This dual role of cooperating association and friends group fundraising partner in one organization is becoming increasingly common in the national park system as both NPS and partner organizations seek flexibility, efficiency, and sustainability.

SPC is also a partner to the U.S. Army Corp of Engineers (USACE) site at Lake Kaweah. While smaller in scale and scope than SPC’s work with SEKI, activities at the lake provide an opportunity for SPC to engage new audiences and further support federally managed lands in the local community.

SPC is in a period of opportunity, challenge, and growth. After successfully navigating the rigors of the merger and changes in scope and leadership, SPC has a bright future and is poised to meet new opportunities head on, elevating its impact in support of the wonders of Sequoia and Kings Canyon National Parks and Lake Kaweah.

This strategic plan is intended to help SPC think creatively and strategically about priorities and actions, rather than providing a checklist of tasks to complete. The focus areas and objectives identified in this document provide a framework for organizational decision making and prioritization. For each objective, multiple actions and tactics as well as appropriate metrics and milestones will need to be established through a regular work planning process.
This is a perfect time for SPC to engage in a detailed strategic planning process. SPC’s strong track record and longstanding support of SEKI is matched by SEKI’s commitment to partnership and eagerness to work with a strong partner organization.

Both SPC and SEKI leadership are ready to take their collaboration to the next level. To seize this opportunity, SPC must be clear about how to engage, where to focus its efforts, and on which topics to say “no” or “not yet.” SPC’s 2018 strategic plan focuses on key organizational, programmatic, and sustainability needs, as well as important areas for additional analysis and assessment.

The strategic planning process took into account the organizational context within which SPC operates. A focus on SPC’s future during this planning process has provided significant momentum. Board and staff members have not envisioned this plan as a remedy for past challenges, though it may serve some of those needs. Rather, the plan is a tool that will help SPC step intentionally into its future as an organization that can match SEKI’s needs with consistent excellence, contribution, and commitment.

SPC has already created the momentum for change in several important ways. This momentum supports the key elements of SPC’s new vision for the organization, its operations, and its impact.

### POSITION OF STRENGTH

<table>
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<tr>
<th>MOMENTUM FOR CHANGE</th>
<th>ELEMENTS OF SPC’S NEW VISION</th>
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<tbody>
<tr>
<td>Coming out of the merger, stakeholders are ready to be “one SPC”</td>
<td>Organizational capacity is strengthened by focusing on board development, increasing staff’s skills, and adding key new positions</td>
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<td>Recent leadership transitions create opportunity to try new approaches</td>
<td>Operational and funding systems are clarified and sustainable</td>
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<td>Passionate and committed staff who have strengthened SPC and made it a great place to work</td>
<td>Support for the park is maximized through continued programming excellence and by executing on key commitments</td>
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<td>Board members have a deep love for SEKI and what it provides visitors</td>
<td>Reinvigorated fundraising efforts and a philanthropy program developed in support of SEKI and SPC</td>
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<td>An engaged superintendent and key staff with a history of successful collaborative efforts are ready to seize an opportunity for close partnership</td>
<td>Fundraising, membership, and organizational communications are professional, timely, targeted, and compelling</td>
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<tr>
<td>Staff and board have an eagerness for change, impact, and growth—the prevailing attitude is “let’s get moving!”</td>
<td>Rigorous communication and joint planning systems exist between SPC and NPS, and SPC and USACE</td>
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<tr>
<td>Strong existing platforms for education programs, retail operations, and visitor services</td>
<td>SPC becomes a national model of partnership and excellence within the park support community</td>
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</tbody>
</table>
SPC is an active, functioning organization with a long track record of success extending through the tenures of SNHA and SPF. To build a strong foundation for growth, efficiency, and sustainability, SPC will focus significant effort on strengthening organizational operations, leadership, and governance. The board and staff have identified multiple areas for operational improvement, efficiency, and modernization, and demonstrate an eagerness to streamline operations and make daily workflow easier. Developing an adaptive management approach and process to track, measure, and refine activities and initiatives will strengthen change efforts and support collaboration with SEKI and funders.

Focusing on organizational development will not replace robust retail, program, and philanthropic activities, but may slow their growth in the near term in order to build greater capacity and stability for the long-term. As this balance becomes clearer, it will be important to clarify goals and intentions and communicate regularly with key partners, staff, and other stakeholders.

SPC's board has demonstrated the ability to effectively manage the organization through recent leadership transitions and past financial and programmatic hurdles. The board has been an active partner with staff in SPC’s evolution. As SPC grows and develops, the board will focus more on governing the organization and less on managing the organization. Organizational management will be entrusted to the executive director, with clear lines of responsibility, communication, and accountability in place.
## TACTICS, ACTIONS, TIMELINE: Strengthen SPC as an Organization

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<tr>
<th>TACTICS</th>
<th>ACTIONS</th>
<th>2018</th>
<th>2019</th>
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<tbody>
<tr>
<td>Create a 5-year vision statement</td>
<td>Develop a short, compelling statement outlining what SPC will be in five years</td>
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<td>Coordinate communications around the vision and look for opportunities to align activities and other messaging toward the updated vision</td>
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<td>Strengthen board governance and committee structure</td>
<td>Assess the board structure and determine if it still fits the needs of the organization, including terms of service, committee structure, specific skill sets, fundraising expertise, and key operational expertise (financial, legal)</td>
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<td>Transition the board from a working-governing board hybrid to a governing board with committees that support key aspects of SPC operations and programming</td>
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<td>Clarify and document the responsibilities and expectations of board officer and committee leadership</td>
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<td>Develop a board manual that brings all the information needed by new and existing board members into one resource and update it regularly</td>
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<td>Develop a system to recruit new board members, including assessment of board skill, geography, and diversity considerations</td>
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<td>Seek to add additional board members from outside the current board’s geographic reach; consider fundraising and organizational visibility needs</td>
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<td>Conduct an annual board retreat focused on board development, strategic planning, and annual operational needs review</td>
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<td>Invest in executive leadership and staff development</td>
<td>Review SPC’s organizational structure and assess the best management team structure to match the organization’s priorities; assess staff roles to ensure each matches SPC’s priorities, functional needs, and funding</td>
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<td>Identify and assess the key components of SPC’s organizational culture, document and share these findings, and engage all staff in actively enhancing and celebrating what makes SPC a great place to work</td>
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<td>Develop a culture and operations that rely on a strong executive director</td>
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<td>Develop a common understanding among board members of the role of the executive director and the essential skills and expertise SPC needs from that role at this time</td>
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<td>Provide leadership development training for key positions and the staff leadership team</td>
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<td>Conduct joint training sessions with NPS staff to increase information sharing, collaboration, and skill development</td>
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<td>Systematize and document</td>
<td>Identify key metrics for capacity and sustainability that can be compared/benchmarked</td>
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<td>business operations</td>
<td>against other nonprofits (e.g., overhead rate, earned revenue growth, ratio of personnel costs to earned revenue)</td>
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<td>Develop an adaptive management approach and process to assess, measure, and refine new and</td>
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<td>existing activities and operations organization-wide</td>
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<td>Update the employee handbook with accurate, relevant information for all employees, and</td>
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<td>additional sections specific to departments</td>
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<td>Develop an organization-wide budget template and annual budget management calendar,</td>
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<td>including a board reporting template</td>
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<td>Where operations and program delivery interface with NPS, assess and/or redevelop</td>
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<td>existing joint planning materials; these systems should require and ensure information</td>
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<td>sharing, collaboration, and the operational realities and timelines of all parties</td>
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<td>Assess all areas of operations for potential inefficiencies, obstacles to be addressed,</td>
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<td>outdated practices, and opportunities to improve performance or make the work easier</td>
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<td>(e.g., technology solutions, office locations, redundant paperwork, poor communication,</td>
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<td>lack of transparency)</td>
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<td>Develop remote worker management, communication, and accountability systems, and provide</td>
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<td>remote work as an option for staff if appropriate to their role</td>
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<td>Redefine SPC’s membership</td>
<td>Assess and redefine what it means to be a member of SPC; consider from outreach,</td>
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<td>program</td>
<td>fundraising/donor development, constituency building, and mission delivery, perspectives</td>
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<td>Review and redevelop member communications and management strategy, calendar, and</td>
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<td>materials</td>
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<td>Review and coordinate the membership recruitment opportunities available in all</td>
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<td>departments; set one department as the membership coordination leader</td>
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<td>Diversify earned revenue</td>
<td>Review current earned revenue streams for threats and realistic growth opportunities,</td>
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<td>opportunities</td>
<td>develop operational contingency plans in response to known threats</td>
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<td></td>
<td>Examine earned revenue opportunities with other existing and potential partners (USACE,</td>
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<td>education groups, tour operators)</td>
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<td>Develop a business plan(s) focused on key organizational revenue drivers</td>
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</table>
OBJECTIVE: Develop a philanthropy program to increase funding for park priorities, support SPC/SEKI collaboration, and engage a broader community on behalf of SEKI and SPC

SPC has a strong opportunity to develop a robust philanthropy program in support of park priorities. SPC’s fundraising will also seek to support SPC’s sustainability and ability to effectively collaborate with SEKI. Coordination with SEKI leadership is essential to balance these priorities and establish a partnership that is seamless to the visitor, donor, and park communities.

While continuing to engage local communities, SPC’s philanthropy efforts should be built over time to a national scale commensurate with the status, history, and potential of these parks. To manage this outreach, SPC will professionalize its philanthropy approach, materials, and messaging. Engaging all departments, as well as key partner resources, will help to integrate a philanthropic approach throughout the organization.

SPC will approach fundraising as a long-term process and commitment. This includes developing appropriately gradual expectations, maintaining a membership and donor base, building long-term relationships, and cultivating major donors. Events, activities, and collaborations will be developed to support SEKI and SPC priorities on a regular basis, rather than significant effort being spent on one-off opportunities.
## TACTICS, ACTIONS, TIMELINE: Develop a Philanthropy Program

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<tr>
<th>TACTICS</th>
<th>ACTIONS</th>
<th>2018</th>
<th>2019</th>
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<tbody>
<tr>
<td>Design a philanthropy program</td>
<td>Hire a philanthropy director and establish a timeframe or triggers for hiring other philanthropy department staff</td>
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<td></td>
<td>Create a detailed work plan with the philanthropy director which establishes a strong framework for SPC’s philanthropy program</td>
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<td>Assess the board, other departments, and individual staff roles for their potential opportunities to support the philanthropy program</td>
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<td></td>
<td>Establish the philanthropy program as a way to fundraise for SEKI priorities and SPC sustainability</td>
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<td></td>
<td>Coordinate with the SEKI superintendent and key staff on fundraising access, messaging, branding, outreach, and meetings</td>
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<td>Systematize donor management</td>
<td>Identify and implement donor management software; look for opportunities to address more than one organizational need with this action</td>
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<td></td>
<td>Bring all outreach, membership, and donor lists (current and historic) into one system</td>
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<td>Develop a fundraising plan</td>
<td>Create a fundraising plan, including financial targets, donor identification, operational systems, geographic reach, and SPC department collaboration opportunities</td>
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<td>Develop an adaptive management approach and structure to assess, measure, and refine philanthropic effort</td>
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<td></td>
<td>Cultivate relationships with development staff at peer organizations</td>
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<td>Broaden the geographic approach</td>
<td>Gradually develop fundraising capacity in key regional markets, specifically greater Los Angeles, San Diego, and the San Francisco Bay Area</td>
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<td>to fundraising</td>
<td>Assess SEKI visitor data for fundraising location opportunities, demographics, and activity information</td>
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<td>Strengthen communications and</td>
<td>Seek opportunities to increase SPC’s national visibility in the park partner community, consider other industries to target (tourism, activity-specific groups, conservation organizations)</td>
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<td>branding</td>
<td>Increase the frequency and visibility of SPC/SEKI co-branding</td>
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<td>Coordinate philanthropic outreach with the communications department</td>
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<td>Utilize a common branding approach to all SPC communications, include the ability to tailor components of messages or collateral pieces to specific target audiences</td>
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BUILD ON EXISTING RETAIL AND PROGRAM STRENGTHS

OBJECTIVE: Strengthen existing programs and retail operations as a priority while strategically assessing opportunities for retail growth and new program development.

SPC has built a strong retail operation and an impactful catalogue of program offerings. Together, these services form the historic core of SPC’s activity and engagement with the park. During the current growth phase and push to develop a philanthropy program, care must be taken to ensure that retail and programming operations continue to receive the attention, resources, and assessment they require to expand in ways that align with SPC’s strategic priorities and support overall organizational health and sustainability.

However, given a near-term organizational focus on operations and philanthropy, there may be program opportunities that do not, or no longer, fit with SPC’s strategic priorities and operational capacity. It will not be enough to launch a program, event, or explore an opportunity because it is possible or has a strong staff or board supporter. New and existing activities will now be assessed in light of their strategic and mission alignment and the opportunity they represent to enhance existing activities, outreach, or partnership.
## TACTICS, ACTIONS, TIMELINE: Build on Existing Retail and Program Strengths

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<tr>
<th>TACTICS</th>
<th>ACTIONS</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
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<td>Streamline and systematize coordination and communication with partners, especially NPS</td>
<td>In collaboration with NPS, develop a detailed annual calendar at the director/manager level to track regular collaboration dates (including meeting dates, key decision points, deliverables, and reporting timelines required by NPS or SPC)</td>
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<td>Develop and maintain a regular collaboration-focused meeting schedule for SPC department heads and their NPS counterparts (include a standing agenda item that addresses how collaboration can be improved)</td>
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<td>Review and maximize USACE partnership and revenue generation opportunities semi-annually</td>
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<td>Maintain a close working partnership between SPC leadership and the SEKI superintendent and key staff, with a focus on collaboration, problem solving, and fundraising</td>
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<td>Develop a decision-making process and map program choices to strategic priorities</td>
<td>Create a decision-making process for new programs or growth/expansion opportunities (including impacts on operations, staffing, finances, physical space, expertise/skills, and strategic direction)</td>
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<td>Assess current programs using the decision-making process to determine if there are any programs or retail aspects to put on hold or discontinue</td>
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<td>Assess infrastructure needs related to maintaining and improving current and anticipated programming, staffing, and priorities</td>
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<td>Strengthen the Institute’s role as SPC’s marquee programmatic offering and conduct an analysis of its strengths, challenges, and opportunities</td>
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<td>Expand and strengthen retail operations and related partnerships</td>
<td>Use LPVC retail space expansion as an opportunity for closer alignment with NPS and DNC (reinforce a spirit of “we can do this together”)</td>
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<td>Develop a process to maintain a closer working partnership with local DNC retail leadership (including regular process, product, and collaboration meetings among SPC, NPS, and DNC)</td>
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<td>Ensure seamless SPC and NPS branding and cross-department promotions are in place and review regularly (including regular meetings among the retail, communications, and philanthropy teams)</td>
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