

# Park Partners Report 2024

INNOVATING FOR THE  
FUTURE OF PARKS

JUNE 2024

**REDSTONE**

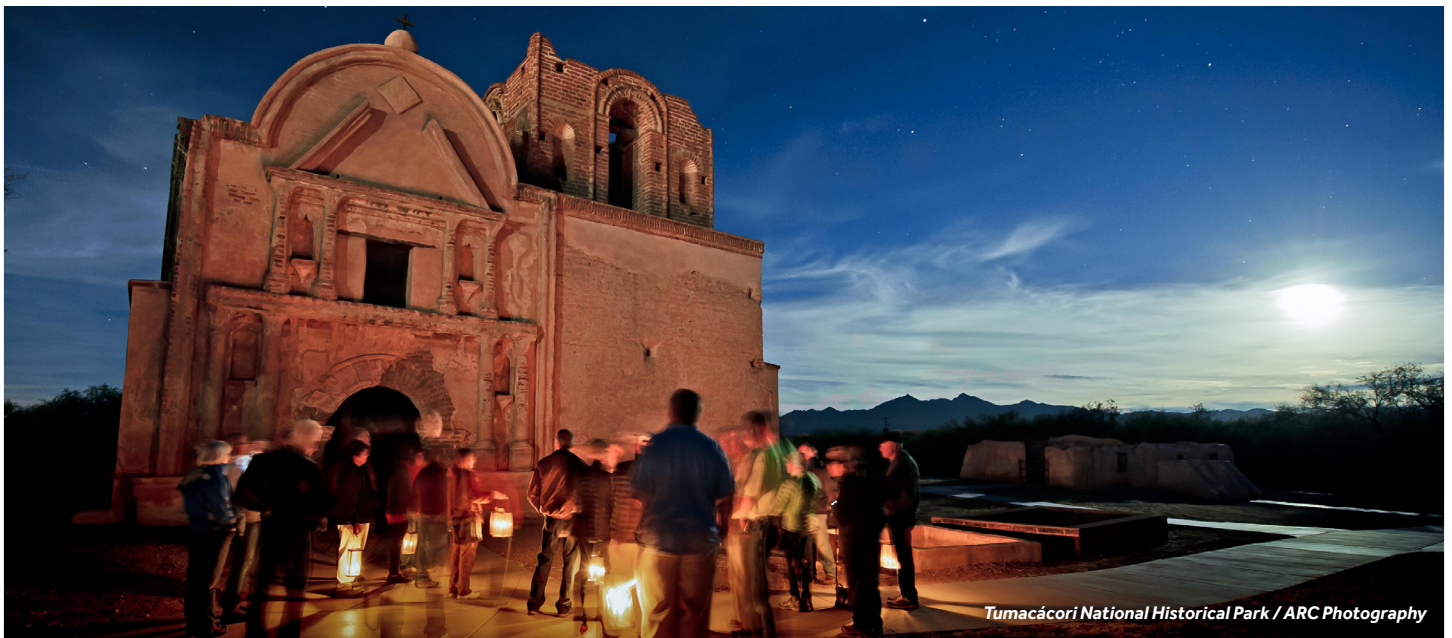
COMMISSIONED BY



**National  
Park Foundation**

Buffalo National River / Jeff Rose

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# Introduction



National parks experienced substantially increased public interest over the past two years.<sup>1</sup> The national park partner community, comprising 470 organizations across the country, helped parks engage the public, create lifelong memories for visitors, and launch groundbreaking new initiatives to expand park offerings. At the same time, the park community navigated widespread challenges, including inflation and a tight labor market.

It has been an important two years for the park community. The Friends Alliance became an independent non-profit membership organization in 2023, offering year-round mentor and peer support to a quickly growing membership that already includes over 100 park partners.<sup>2</sup>

The attendance at the fall Friends Alliance meeting was its highest ever at nearly 300 partnership practitioners. Revisions to the National Park Service (NPS) Director's Order 21 and accompanying Reference Manual 21<sup>3</sup> have clarified rules regarding philanthropic partnerships, and the national collective campaign to support national parks has launched. Meanwhile, the initial effects of COVID-19, as described in the 2022 Park Partners Report, have become a distant memory.

Park partners – which include coordinating entities, cooperating associations, friends groups, and other organizations<sup>4</sup> – are helping to provide solutions to some of the most pressing challenges to the National Park System: Working in

1. Visitation numbers increased from 297 million in 2021 to 325 million in 2023.

2. The Friends Alliance is an independent, non-profit membership organization for friends groups and other organizations working in partnership with national parks, providing community organization and networking opportunities.

3. Director's Order 21 is the NPS policy on donations and philanthropic partnerships that employees and authorized philanthropic partners must follow.

4. Other organizations include service corps organizations, land trusts, and educational organizations. Organizations that fit into multiple categories are classified in the following priority order: coordinating entity, cooperating association, friends group, and other. Organizations are also classified in the following sizes by annual park-related revenue: Emerging: <\$50K; Small: \$50-\$250K; Medium: \$250K-\$1m; Large: \$1-\$5m; Very Large: >\$5m.

partnership with parks and NPS leadership, park partners are addressing the housing crisis by prioritizing new affordable units to build. They are investing in the future workforce, expanding opportunities for all youth to engage, and galvanizing greater access to the outdoors for historically excluded communities. And they are working towards climate resiliency by decarbonizing operations and protecting vital land.

The 2024 Park Partners Report provides a snapshot of the national park partner community, detailing the community's collective impact and current challenges. It can inform how NPS, the National Park Foundation (NPF), and the Friends Alliance engage park partners. It can also inform how park partners can further advance the mission of the NPS.

The report highlights innovative successes and demonstrated needs in the park partner community over the last two years, spanning the following takeaways:

➤ **Park partners are trailblazing new ways to advance the mission of parks**, with more than \$500 million in collective support to national parks. Park partners shared extraordinary accomplishments over the past two years, including partnering with Indigenous communities and leading inclusive storytelling to building affordable housing for park staff. Partners are also experimenting with new roles to adapt to park needs, such as direct project management and general operations (e.g., one park partner funded staffing, communications, and maintenance at a historical cabin).

➤ **Partners prepare to launch bold initiatives in 2024 and beyond.** Park partners are prioritizing a 21st century visitor experience with their Superintendents over the next 3-5 years.<sup>5</sup> Groups of all sizes expect to grow their staff capacity and maintain or increase their impact on national parks.

➤ **Capacity remains a key issue for partners and parks across the country.** This includes sufficient NPS staff to address partner needs and shared priorities, as well as partner internal fundraising capacity and lack of diversity. Partners reported their #1 barrier to greater impact as insufficient NPS staff availability due to increasing pressure on parks. Partners request differing supports from NPF and the Friends Alliance based on size: smaller organizations seek fundraising support; larger organizations seek a range of tools including greater support with NPS policies, as well as increasing diversity, equity, and inclusion (DEI).

➤ **The park partner community can work together to:**

- Help partners accelerate growth and fundraise more, together
- Experiment with new roles for park partners to support NPS's mission
- Support NPS staffing and relationships with philanthropic partners

5. In the 2024 survey distributed to park partners, 21st century visitor experience is defined as "Improving access and usability, restoring structures, modernizing visitation."

# Park partners are innovating in education, housing, and more

Each national park, heritage area, river, and trail is unique. Park partners are adapting their support wherever possible to meet their parks’ distinctive and evolving needs. Partners may spearhead a capital project to build a visitor center to accommodate 21<sup>st</sup> century needs or provide educational programming to historically excluded communities. Some partners are adopting entirely new roles in operations or management. This breadth of impact has enormous collective power: In 2023, park partners contributed more than \$500 million to national parks in direct and indirect aid. This support is vital to ensure the continuation of park operations and programming amidst increasing visitation and decreasing numbers of NPS staff.<sup>6</sup>

While this report seeks to measure direct and in-kind support where possible, we recognize the full impact of the community is unquantifiable and cannot be fully captured here.

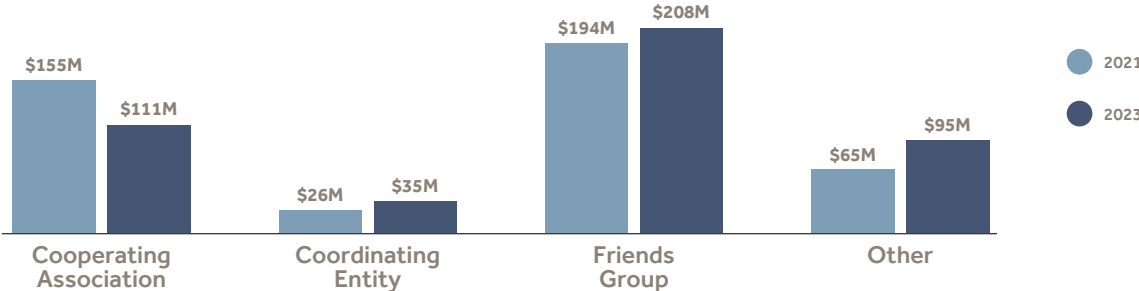
## Park partners contributed more than \$500 million to national parks

We estimate more than half of park partners increased their impact on national parks from 2021 levels, contributing a total of \$530 million to national parks.<sup>7</sup> Support to national parks increased for coordinating entities, friends groups, and “other” organizations while decreasing slightly for cooperating associations (Figure 1). The decline in cooperating association contributions from 2021 follows a one-time spike in support due to the successful, now completed, Presidio Tunnel Tops initiative from the Golden Gate National Parks Conservancy (CA), which was a large capital project in partnership with the Presidio Trust.<sup>8</sup>

In addition to financial support, park partners delivered an immense volunteer force. More than half of park partners reported working with

**FIGURE 1: SUPPORT TO NATIONAL PARKS**

Estimated support to national parks for organizations with available data in both 2021 and 2023, by organization category  
n = 188



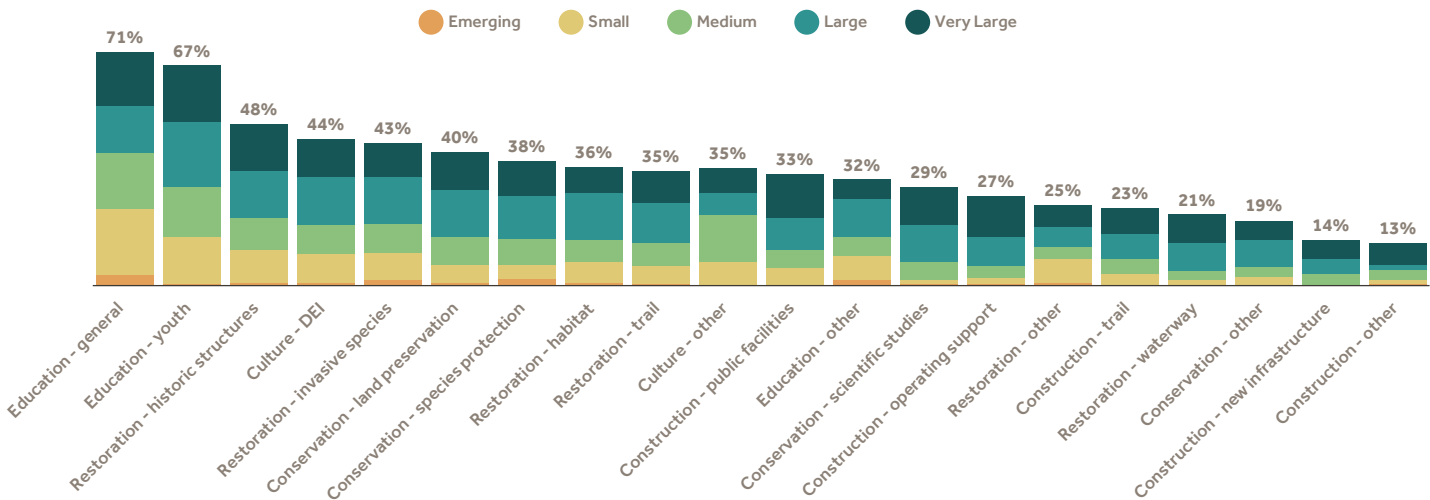
6. Overall park visitation increased by 16% since 2010. (NPS, [Visitation Numbers 2021 – 2023](#).) In that same time period, NPS has seen a 16% decline in staff ([National Parks Conservation Association](#)).

7. See Appendix C for methodology on how support to parks was calculated. The \$500 million includes all 306 organizations for which we had data in 2023. This represents an increase in sample size from our 2022 report due to available 990 data, at which time we estimated \$430 million in support in 2021 from a sample size of 203 organizations. Average support to NPS per organization increased 13% from 2021 to 2023. More than half of organizations grew their impact from 2021 to 2023, and the impact for organizations with data in both years grew to \$450M in 2023.

8. The Presidio Trust is a federal agency, distinct from NPS, which manages the site where the Presidio Tunnel Tops was built.

**FIGURE 2: ACTIVITIES BY ORGANIZATION SIZE**

Percent of organizations participating in each activity, n = 93



volunteers in 2023. The community dedicated 980,000 volunteer hours in 2023, matching 2021 rates. (This is the equivalent of 122,500 days, or 471 full time employees.)

### Partners share innovative success stories, from inclusive education to new housing

Partners continue to engage in a wide range of activities, informed by what their park needs most and overall priorities of the National Park Service. Park partners are answering the high demand for education, with more than two-thirds of partners providing education for youth and adults (Figure 2).<sup>9</sup> Nearly half of partners are involved in historic restoration and 44% report engaging in diversity, equity, and inclusion (DEI). Partners are thoughtfully integrating DEI across activities, such as creating novel collaborations with local Indigenous communities to lead historic storytelling.

9. Percentages add up to more than 100% because respondents chose multiple activities.

Park partners are pioneering creative ways to support parks across programs. Recent accomplishments include:

- **Engaging Indigenous artists in education programming:** Ocmulgee Mounds Association (GA) worked with the Muscogee Nation to bring Muscogee artists and cultural educators to the Ocmulgee Mounds National Historic Park. Muscogee artists led programming and added art to the store inventory for the first time. As part of this initiative, members of the Ocmulgee Mounds Association traveled to the Muscogee Reservation to learn more about Muscogee culture.
- **Preserving historic structures through novel partnerships:** National Park Partners for Chickamauga, Chattanooga, and Moccasin Bend (TN) bought a Trail of Tears and Civil War landmark in Chattanooga, TN, to ensure its preservation. They worked with the State of Tennessee to permanently protect the land

from future development and are now organizing events at the landmark.

- **Protecting vast expanses of land:** Big Bend Conservancy (TX) introduced legislation for a proposed 6,100-acre boundary adjustment at Big Bend National Park and raised over \$750,000 thus far to purchase land within the proposed boundary adjustment area.
- **Creating affordable housing:** 13% of park partners reported involvement in housing activities and the need for affordable housing for park staff and seasonal workers was a recurring theme in this year’s survey. Rocky Mountain Conservancy (CO) is one example among several park partners prioritizing housing initiatives. The Conservancy built 16 bedrooms close to the park to supplement affordable housing for both the Conservancy and NPS staff. The land for the project was donated, and the Conservancy funded and oversaw the construction, making this housing unit an asset in addressing affordable housing in the gateway community

of Estes Park and an important financial asset for Rocky Mountain Conservancy.

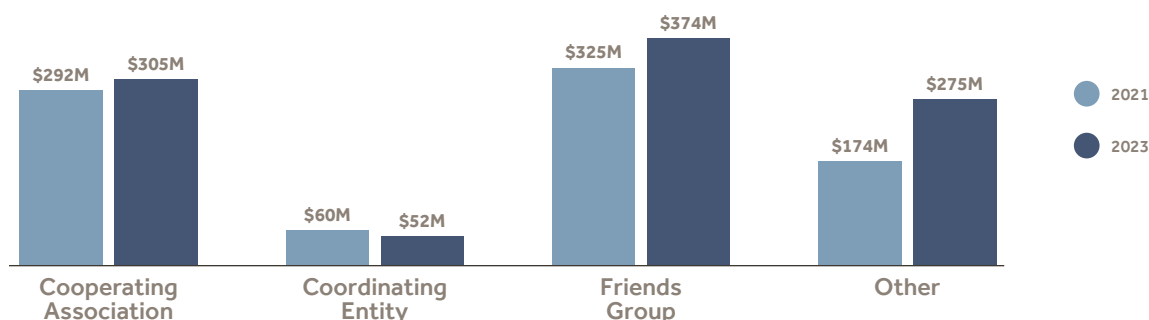
### Park partners generated \$1 billion in park-specific revenue<sup>10</sup>

Park partners found creative ways to raise revenue over the past two years. Park partners across categories reported a steady state or increase in revenue from 2021 (Figure 3). “Other” organizations reported the largest increase, driven by new initiatives in a handful of organizations. For example, the Wolf Trap Foundation for the Performing Arts (VA) launched a successful capital campaign effort, raising \$75 million in contributed income to build the Foundation’s endowment and support meaningful capital improvements at Wolf Trap National Park for the Performing Arts.<sup>11</sup> Collectively, groups raised over \$1 billion in park-specific revenue to support national parks.<sup>12</sup>

Park partners plan to build on revenue gains to create even more impact in 2024.

**FIGURE 3: PARK SPECIFIC REVENUE**

For organizations with available data in both 2021 and 2023, by organization category, n = 214



10. If an organization engages in activities beyond its work with NPS, we calculate their “park-specific revenue” by adjusting their total revenue based on the proportion of work done specifically to support national parks.

11. Wolf Trap Foundation for the Performing Arts is classified as “other,” as it has a unique agreement with NPS regarding the presentation of performing arts and related educational and cultural programs. The Foundation also conducts fundraising activities in support of activities in and for the benefit of Wolf Trap National Park for the Performing Arts under a philanthropic agreement.

12. The \$1.1 billion includes all 311 organizations for which we had data in 2023. This represents an increase in sample size due to available 990 data from our 2022 report, at which time we estimated \$600 million in revenue. With our larger sample size, we estimate \$850 million in revenue in 2021, and \$1,040 million in 2023. The graphic compares the 214 organizations for which we had data in both 2021 and 2023. We estimate 26% of total 2023 revenue is earned, 63% contributed, and 11% other. An increase in contributed revenue is driving revenue growth for most organizations. Cooperating associations experienced a larger increase in earned revenue, possibly due to increased visitation and continued growth in activity post-pandemic. The National Park Foundation is included as a Friends Group. More information on methodology can be found in Appendix C.

# Park partners are launching bold initiatives in 2024

In 2024, park partners and Superintendents plan to launch a series of innovative initiatives to improve visitor experiences, create climate resiliency, celebrate Indigenous histories, and more, setting the stage for a transformative period in park stewardship.

Park partner organizations anticipate growing their staff and their impact on parks, with financial support expected to rise in 2024.

## Park partner organizations expect to grow in 2024

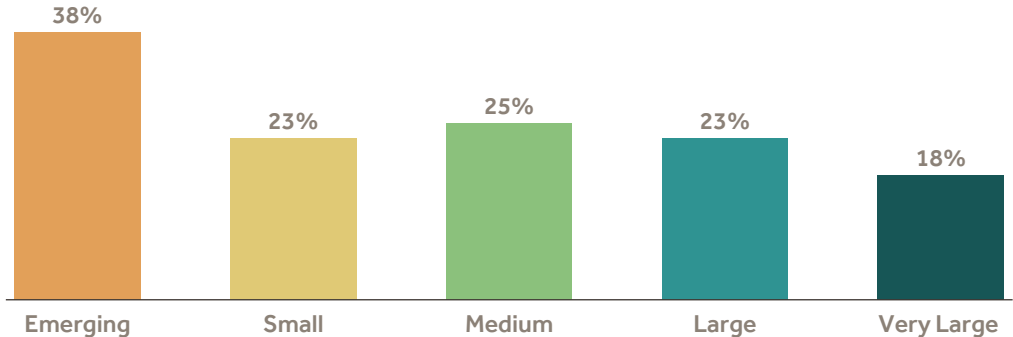
On average, partners of every size anticipate expanding their teams in 2024 (Figure 4). While emerging and small organizations forecast a modest increase, adding less than one employee

on average, this represents a sizeable 23-38% increase in their staff.<sup>13</sup> Medium-sized organizations plan to add around one employee. Large organizations plan to add three and extra-large organizations project to add eight employees.

## Park partner organizations expect to increase their support to national parks in 2024

Park partners across categories expect their support to national parks in 2024 to stay consistent or grow (Figure 5).<sup>14</sup> At an individual level, organizations reported that they contributed an average of \$250,000 in 2023 and expect to contribute an average of \$280,000 in 2024, an increase of 12%.<sup>15</sup>

**FIGURE 4: EXPECTED GROWTH IN STAFF BY ORGANIZATION SIZE**  
Percent estimated growth in 2024 (by full-time equivalent employees added), n = 82

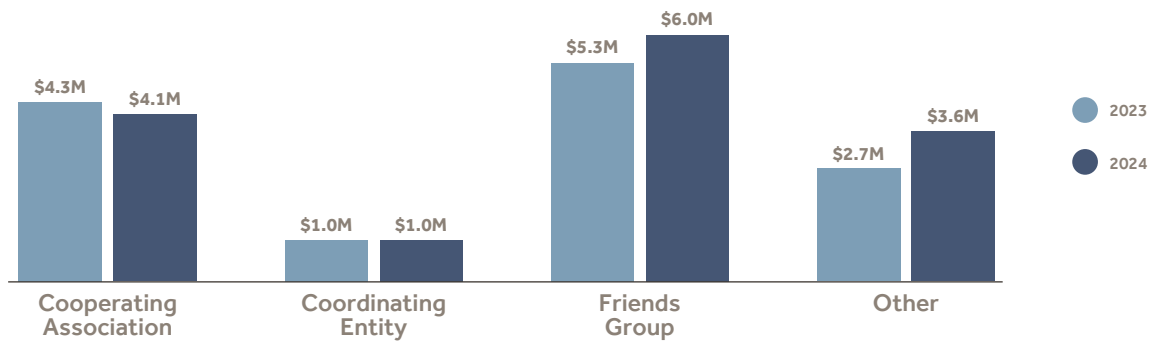


13. Breakdowns of the proportion of survey respondents by size can be found in Appendix C.  
14. Impact to NPS by category in Figure 5 is restricted to the 52 organizations who submitted survey responses estimating future impact. This differs from the numbers in Figure 1, which captures organization data from many more organizations through survey responses and 990s.  
15. The decrease in cooperating association support is still explained by Golden Gate National Parks Conservancy, whose support to national parks has normalized following the completed expansion of the Tunnel Tops initiative with a new picnic and gathering area.



**FIGURE 5: ESTIMATED SUPPORT TO NATIONAL PARKS IN 2023 AND 2024**

Average support to national parks based on survey responses, n = 52



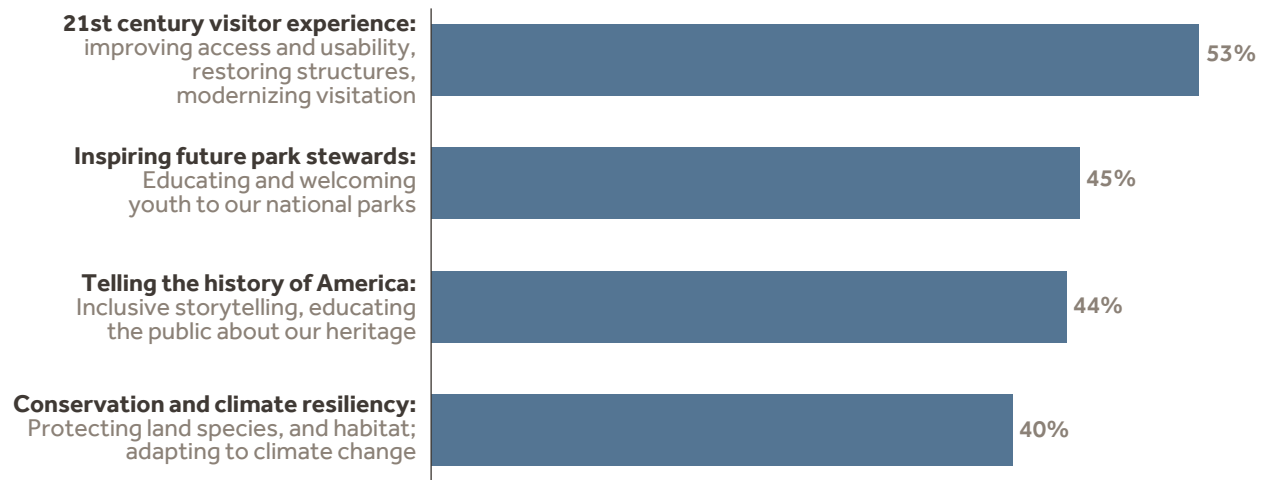
### Park partners are prioritizing the visitor experience in 2024 and beyond

Partners are planning dynamic initiatives to support their parks over the next 3-5 years, from funding projects that create climate resiliency to honoring Indigenous history (Figure 6).<sup>16</sup> Most park partners are focused on the 21st-century visitor experience, while many are working with their Superintendents on all the priorities shown.



**FIGURE 6: PERCENT OF ORGANIZATIONS CHOOSING EACH AREA AS A PRIORITY OVER THE NEXT 3-5 YEARS**

n = 109



16. Percentages add up to more than 100% because respondents chose multiple areas of priority.

Examples of upcoming initiatives include:

### 21st century visitor experience:

- **Chattahoochee National Park Conservancy (GA)** will sustainably transform over 100 miles of trails, enhancing accessibility and environmental stewardship.
- **Friends of Kenilworth Park & Aquatic Gardens (Washington, D.C.)** will enhance language inclusivity by offering programming to non-native English speakers, making the park accessible to a more diverse audience.



### Inspiring future park stewards:

- **Great Basin National Park Foundation (NV)** will grow its new camping program for youth from historically excluded communities in Salt Lake City and Las Vegas, continuing its educational and outreach focus on Black, Indigenous, and people of color (BIPOC) communities. Additionally, they will weave tribal narratives into the park's exhibits for future visitors.
- **Student Conservation Association (VA)** is expanding its Urban Green programming, prioritizing project sites that are located in areas diverse in gender, socioeconomic status, household size, school, age, and race. They are hiring from local neighborhoods to provide green jobs, workforce development, and equitable access to nature to fight back on the “generational trauma that keeps people of color from visiting the natural world.”<sup>17</sup>

### Telling the history of America:

- **National Park Partners of Chickamauga, Chattanooga, and Moccasin Bend (TN)** will collaborate with the National Trail of Tears Association to honor Indigenous history.
- **Lincoln Presidential Foundation (IL)** and other partners will develop the Rosenwald exhibit, which will be the first core exhibit on a Jewish American in any NPS unit.

### Conservation and climate resiliency:

- **National Parks of Lake Superior Foundation (MN)** will decarbonize park buildings and infrastructure, aiming to set a precedent for sustainable park management and climate resiliency.

17. Student Conservation Association survey response.

# Barriers to impact include capacity, fundraising, and diversity

Partners describe an array of challenges preventing them from further increasing impact (Figure 7).<sup>18</sup>

## A lack of NPS staff availability has become the greatest barrier

The shortage of NPS staff availability, given the many demands on their time and increasing pressures on parks, was the most significant obstacle highlighted by partners in 2024. As Figure 7 shows, this concern was also underscored in 2022. Partners expressed concerns over high staff turnover, which complicates the establishment of long-term collaborations and the execution of shared visions for the parks' futures. They also described challenges in data collection and progress reporting for donors, often attributed to NPS staff time constraints arising from limited capacity. One park partner said, “It has been...

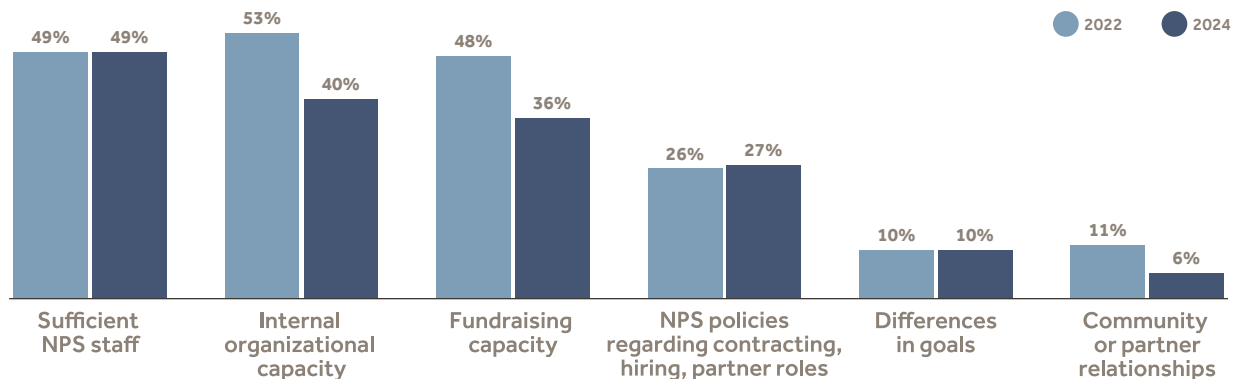


difficult for both us and our park. The passion and willingness is there from both of us, but the system is working against [us]...We can fund and do programming, but it’s really the rangers [that] help to make the park experience special.”

Park partner capacity, while a barrier for fewer organizations in 2024 than in 2022, is still a challenge for many. The park partner community employed 18% fewer employees in 2023 compared to 2021 levels.<sup>19</sup>

**FIGURE 7: BARRIERS TO SUCCESS BY ORGANIZATION TYPE**

Percent of organizations choosing each area as one of their biggest limitations in maximizing impact on NPS  
n = 126 in 2022, n = 108 in 2024

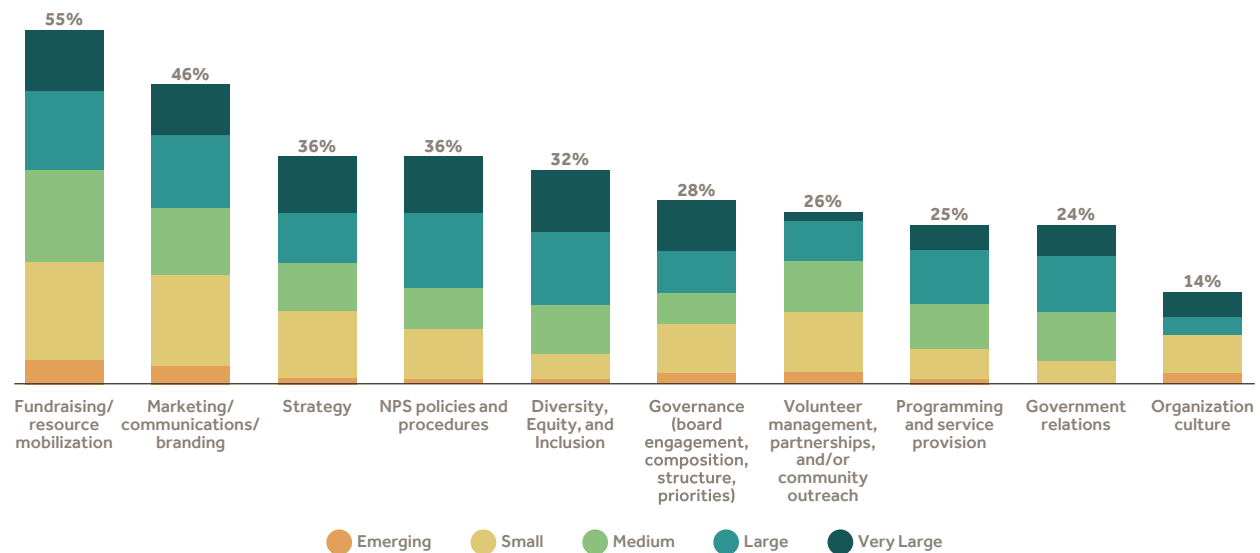


18. Percentages add up to more than 100% because respondents chose multiple barriers to success.

19. Among 78 organizations for which we have data in 2021 and 2023.

**FIGURE 8: REQUESTS FOR SUPPORT BY ORGANIZATION SIZE**

Percent of respondents choosing each category as 1 of 5 areas from which they would benefit from training, new tools, or support  
n = 110



### Smaller partners elevate fundraising needs, while larger partners seek a range of support

Park partners highlighted a variety of tools that would be helpful in navigating the barriers described above. Most partners request fundraising support from NPF (Figure 8). Smaller organizations in particular can struggle to fundraise without a dedicated staff member. Some partners seek fundraising support for specific capital projects, such as creating new visitor centers or restoring historic monuments.

In addition to fundraising, larger organizations seek guidance on NPS policies, as well as strategies to increase diversity, equity, and inclusion (DEI). With respect to NPS policies, organizations request best practices for fostering robust partnerships with NPS and help streamlining agreement processes. On DEI, some larger organizations share a desire to learn from peer institutions. One organization noted that a generational gap on



their board can create differences in understanding inclusivity. This may indicate an opportunity to target DEI support to larger organizations and their boards. Smaller organizations may benefit from broader capacity building within their board and leadership (e.g., help with staff training, support with strategic planning, knowledge of what peer organizations are doing).

FIGURE 9: PARK PARTNER BOARD AND LEADERSHIP DIVERSITY RELATIVE TO INDUSTRY AVERAGES

BOARD DIVERSITY	SURVEY RESPONDENT BOARD DIVERSITY 2023	SURVEY RESPONDENT BOARD DIVERSITY 2021	GREEN 2.0 BOARD DIVERSITY 2023
Black, Indigenous, or people of color	10%	10%	33%
Women or non-binary	23%	27%	NA
50 years old or younger	13%	17%	NA
LEADERSHIP DIVERSITY	SURVEY RESPONDENT LEADERSHIP DIVERSITY 2023	SURVEY RESPONDENT LEADERSHIP DIVERSITY 2021	GREEN 2.0 LEADERSHIP DIVERSITY 2023
Black, Indigenous, or people of color	12%	11%	34%
Women or non-binary	41%	44%	56%
50 years old or younger	28%	32%	NA

### Opportunity remains to grow diversity among partner boards and leadership

Park partner organizations trail peer institutions in board and leadership diversity. According to Green 2.0’s 2023 Report Card, environmental NGOs have an average of 33% of board members and 34% of leadership who identify as people of color. In contrast, park partner organizations have an average of 10% and 12% representation among boards and leadership, respectively (Figure 9).<sup>20</sup>

Many park partners are actively working to reach diverse audiences in programming, yet opportunity remains to cultivate organizations that reflect the diversity of the communities they serve. The Cabrillo National Monument Foundation (CA) is one example of an organization actively striving to enhance the diversity of its board in terms of ethnicity, gender, and skill sets, across all regions of San Diego County.

20. The data on environmental NGOs is collected by Green 2.0, an organization committed to enhancing the representation of people of color within the environmental sector. Leadership results are sourced from “Senior Staff Identifying as people of color 2017-2023” and “2023 Gender Identity for Senior Staff” sections of the [Green 2.0 2023 Report Card](#). Board results are sourced from “Board members identifying as people of color 2017-2023.”

# Park partners offer suggestions for NPF, the Friends Alliance, and NPS

In addition to specific requests for support, partners shared general feedback for NPF, the Friends Alliance, and NPS. 81% of park partners rated their relationship with NPF as “somewhat strong” or “very strong.” (Figure 10). All park partners reported that their relationship with NPF had stayed consistent or improved over the past two years.

Partners’ suggestions for the community dovetailed with and expanded upon requests for support, including NPF fundraising, peer learning from the Friends Alliance, and collaboration on strategic priorities with NPS, as described below.

## Organizations appreciate NPF’s partnership and seek tailored funding support

Partners value NPF’s support in navigating relationships with NPS. When surveyed, they also highlighted appreciation for joint fundraising and capacity-building grants. One partner said, “NPF is my favorite partner to work with...I appreciate their consistent willingness to come to the table to brainstorm and collaboratively problem solve.”

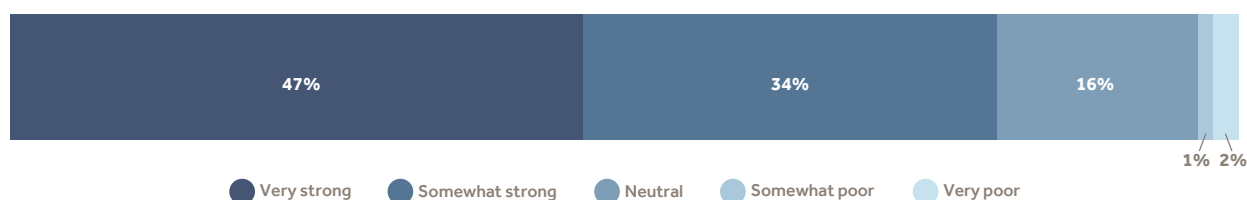
Partners seek NPF’s support in ambitious, long-term projects as well as securing sustainable, multi-year funding sources. Non-traditional partners and some trail groups (e.g., non-profit arts centers) specifically seek more tailored support from NPF: “As a non-traditional park partner, it was somewhat challenging to determine if we would be eligible for funding.” One partner said, “We need to broaden, rather than restrict, the ideas of what a park partner looks and acts like.” Park partners are expanding their ideas of how to support parks – and NPF can support them to do so.

## Park partners encourage the Friends Alliance to expand programming

The launch of the Friends Alliance as an independent non-profit has already generated much appreciation among partners. Partner leaders described training and peer support facilitated by the Friends Alliance as “transformative.” After attending a conference, one park partner leader said, “[This] was a game changer for me...as I transitioned from a program manager to the executive director...this program gave me so

**FIGURE 10: HOW WOULD YOU DESCRIBE YOUR ORGANIZATION'S RELATIONSHIP WITH NPF?**

n = 92



much more confidence.” Partners are excited to see additional peer learning and education opportunities, especially via more frequent connections between annual conferences. One partner expressed that they “would love to see region-specific and/or park size-specific ‘collaboration groups.’ One of the most helpful hours was the very final session of the Ohio conference when we were divided into affinity groups.”

### Partners would like to support NPS to increase capacity and meet park demands

Park partners appreciate opportunities to collaborate with NPS staff on strategic planning and shared priorities. One park partner said, “We have an excellent working relationship with our NPS partner. They include us in strategic planning meetings, which allows us to ensure our priorities are consistently aligned.”

Park partners would like to see NPS hire additional staff, fill vacancies more quickly, and reduce turnover to create stronger partnerships. One park partner highlighted how procedural barriers can slow down hiring or funding and thus they want to find creative solutions to ensure projects keep moving. Park partners would also like to see training for NPS staff on the specific needs of park partners, such as data collection on project progress to align with reporting expectations from funders.



# Recommendations



## The community has made progress on recommendations from the 2022 report

The 2022 report shared three recommendations. Progress on each recommendation and areas for continued work include:

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

NPS policy has been collaboratively updated to provide new flexibilities and efficiencies for partner relationships. For example, in response to feedback from partners who desired longer-term planning, NPS clarified that parks and partners could establish multi-year strategic plans up to five years, with annual reviews and updates. NPS also improved its donor review procedure, reduc-

ing the average time of a final determination to less than 19 business days. The delegated donation acceptance thresholds increased for superintendents, allowing for greater efficiencies in how partners and NPS work together. Approving partnership agreements and accepting donations up to these higher thresholds makes it easier to get funds to parks.

NPS released a memo on tribal co-stewardship in 2022, which has since led to 80 co-stewardship agreements, four of which outline co-management of parks. This will allow for stronger relationships with Indigenous communities.

Efforts to revise Director's Order 21 Reference Manual remain ongoing, alongside updates to procedures that govern partnership design and construction. As a result, NPS currently collaborates with partners on a case-by-case basis to share resources and funding. In addition, regula-



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tory challenges have restricted NPS's ability to transfer funds to park partners for construction management, limiting partners' abilities to step into this role. NPS staff has completed a new training on Director's Order 21, and partner orientation and training are in development.

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

The Friends Alliance was established as an independent nonprofit in 2023. Initial activities include the launch of an online forum for idea exchange, hosting a spring virtual meeting and annual fall conference that each focused on partnership, philanthropy, community engagement, and more.

NPF's Community Partnerships program has pledged \$25 million over five years to drive systemic change and fortification of the national park system through enhanced partnerships with park partner organizations. This investment seeks to cultivate a strong partner network via the Friends Alliance, bolster partner organizations through capacity-building grants, pioneer progressive collaborations with NPS, and boost fundraising through a collective campaign. The collective campaign marks a strategic move towards collaborative national fundraising. A collaborative process between NPF and partners has driven the vision of this campaign and created 6 benefits for partners – collaborative fundraising, enhanced public awareness, corporate opportunities, a national donor recognition event, elevated support from NPF to the Friends Alliance, and creating “one philanthropic community.” In March 2024, a Letter of Agreement

outlining partner benefits was introduced, with 20 organizations signing on initially, and an invitation extended to all park partners in April. Lastly, NPF has met the needs of unique partners by offering funding to trail groups for the first time in many years.

### **Tackle tomorrow's big issues, today**

The National Park Service faces complex, long-term challenges, including threats of climate change, attracting and retaining a robust workforce, and meeting the needs of growing public interest, among others. The scale and complexity of these challenges necessitate investments in innovation and thought leadership. The National Park Foundation has expanded its “Parks of the Future” work, reimagining public engagement with national parks. Through continued investment in research, convenings and pilot projects focused on key park challenges, NPS and NPF plan to engage park partners, universities, and private sector companies to design strategic solutions that address the most pressing and complex issues facing the National Park Service. These solutions include bringing parks to people with emerging digital technology; developing and attracting the workforce of the future; modernizing campgrounds and trails to increase accessibility and sustainability; and identifying broader systemic issues that might require changes in policy.<sup>21</sup>

NPF is preparing to launch the National Parks Innovation Lab, a new “think-and-do” tank in partnership with NPS and the partner community. The lab will “think” via convening thought leaders and commissioning studies and “do” via

21. <https://www.nationalparks.org/area-of-work/parks-of-the-future>.

testing pilots within national parks and then scaling successful innovations. Potential priorities include visitor experience, climate change, transportation, and affordable housing. NPF is currently fundraising to resource the lab prior to launch.

### 2024 recommendations

Park partners demonstrated remarkable ingenuity and adaptability over the past two years. Now, the community can build on its progress since 2022 to address today's needs and continue to push the boundaries of what it means to be a park partner.

The community has strong resources to leverage: The nationwide collective campaign can be an engine to drive impact. The growing Friends Alliance can be an anchor and catalyst for the community, serving as a central hub and resource for park partners. And the new National Parks Innovation Lab can incubate new ideas and demonstrate success at scale.

Potential priorities for the community in the near-term include:

#### **A. Help partners grow and fundraise more, together.**

Park partners seek opportunities to fundraise together. The National Park Foundation and Friends Alliance can maximize their collective impact by amplifying community resources, building capacity, and matching funding and growth opportunities to park needs. Potential activities include:

- **Augment financial resources for national parks through the collective campaign.** The national collective campaign, a collaborative effort between the National Park Foundation and participating partners, can magnify resources, drive community innovation and meet pressing park needs. In addition, NPF can facilitate smaller-scale joint fundraising opportunities (e.g., Giving Tuesday campaign) and support the development of new corporate partnerships.
- **Facilitate regional collaboration on fundraising and other priorities.** NPF and the Friends Alliance can convene regional partners, park staff, and stakeholders to work together on region-specific challenges and opportunities. Regional convenings with NPF major gift officers can allow park partners to build relationships and problem-solve challenges related to growth and fundraising. This could lead to joint fundraising opportunities such as collaborating on a large proposal to a foundation. The Friends Alliance could convene parks in the same region to discuss best practices on shared priorities, such as visitor management or housing solutions for staff.
- **Provide targeted capacity-building support based on partners' unique needs.** For example, the Friends Alliance can connect smaller organizations with larger or more established peer organizations, share potential resources for partners seeking to take on new roles, and facilitate technical support (e.g., donor data reporting) where helpful. NPF can also provide technical assistance grants for

## RECOMMENDATIONS

smaller partners on topics such as fundraising or board development to support their growth.

- **Establish an “opt-in” initiative to diversify boards and leadership.** The Friends Alliance and NPF can consider spearheading a community-wide initiative to encourage diversity gains in park partner leadership and Board representation. Park partners can choose to “opt in” and commit to a shared goal. For example, partners can commit to “30 by 30,” which would involve increasing the representation of people of color in boards and leadership to 30% by 2030. The Friends Alliance can encourage partners that have successfully diversified their organization to share best practices, then elevate those stories on its website, in newsletters, and in other communication tools.

### B. Experiment with new roles for park partners

Some park partners are already meeting changing park needs by taking on new and different roles, from operations (e.g., staffing a visitor center) to project management. Partners often have the flexibility to move resources nimbly – they are well-positioned to experiment with new ways to expedite impact. This will require a willingness to test and adapt as lessons are learned but can result in greater efficiency and collaboration between NPS and park partners.

- **Pilot non-traditional partner functions to address park needs.** Park partners and Superintendents can work together to identify novel opportunities for support. With NPS support,



park partners can manage projects directly, receive direct access to progress data for donor updates, or provide staffing and maintenance at sites. One park partner funded staffing, communications, and maintenance at a historical cabin – this may be a model others can adopt to support essential roles and critical sites. The Friends Alliance can also be a central resource for park partners seeking to network with peers about how they have taken on new functions. Partners can also explore funding seasonal positions and hiring for functions park partners can take on in the near term. NPS staff can assist park partners in identifying those non-traditional functions and can support successful implementation.

- **Explore embedding park partner staff in parks** to facilitate collaboration. Some park partners embed interns in parks each summer. Others provide staff in times of extreme need, such as disaster recovery. NPS and partner organizations can explore applying this model to embed full-time park partner staff. Among

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many functions, embedded park partner staff could act as liaisons between NPS and park partners, engaging in-person in NPS offices and giving insight into decision-making and strategic planning where appropriate.

### C. Support NPS capacity and relationships with philanthropic partners

The park partner community can prioritize collective solutions to build capacity, mitigate staffing challenges, and ensure strong relationships between parks and partners. The community can be an ally and champion to increase NPS funding and streamline hiring processes, and can pursue the following activities:

- **Support filling open park positions.** Park partners can elevate open positions within NPS in areas that need it most, such as newly incorporated Heritage Areas or lengthy linear parks (i.e., trails). This might involve sharing job postings in local communities or historically excluded markets where partners may have relationships, such as historically black colleges and universities.
- **Prioritize housing projects.** Park partners and NPS can prioritize housing projects, especially in urban and vacation areas with high costs of living. Available and affordable housing can reduce recruitment barriers, increasing park capacity directly if NPS housing or indirectly if partner staff housing. Rocky Mountain Conservancy's model of using donated land to increase the number of affordable housing units available to NPS and park partner staff is one example of addressing this need.



- **Enhance fundraising policy.** NPS, NPF, and the Friends Alliance can commit to meeting semi-annually to discuss DO-21 updates and other areas to identify creative new approaches and solutions to challenges the National Park System faces. The Friends Alliance can play another important role by listening to its members about their experiences in applying policies in their parks.
- **Create joint training and learning opportunities for park partners and NPS.** NPF could fund training hosted by the Friends Alliance for new park superintendents and partner executive directors. Training for NPS staff can emphasize the value of park partners and best practices for strong partnerships. Learning groups could also be created for topics such as policies (e.g., Director's Orders 21 and 45)<sup>22</sup> and differing types of park partner groups, such as those working with historic trails. The Friends Alliance can identify training needs and design materials for conferences by utilizing the data and feedback partners shared in this report.

22. Director's Order 45 is the NPS guide to policy that managers and staff follow to implement NPS responsibilities under the National Trails System Act.

# Appendix A: Acknowledgements



Thank you to the National Park Foundation team – Sarah Unz, Madeleine Balkonis, Deb Yandala, Lise Aangeenbrug, and Will Shafroth – for your partnership and deep knowledge of the park partner community. Thank you to all the others at NPF who contributed to this year’s report.

Thank you to Vickie Mates at the Friends Alliance for your collaboration and commitment to this work. Thank you to Karyn Ferro and the National Park Service team for your partnership.

Finally, thank you to all the park partner organizations who took the time to complete the survey, overcoming the challenges of financial data reporting early in the year. This report would not exist without you!

# 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 donate proceeds from sales or provide in-kind support to parks as part of their cooperating association 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 policy on donations and philanthropic partnerships that employees and authorized philanthropic partners must follow.

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

The NPS policy on cooperating associations that NPS staff and cooperating associations must follow. DO-32 helps define and clarify the roles of NPS and cooperating associations to strengthen mission alignment.

## **Director's Order 45 (DO-45):**

The NPS policy that managers and staff follow to implement NPS responsibilities under the National Trails System Act.

## **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:**

An independent, non-profit membership organization for friends groups and other organizations working in partnership with national parks, 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 preserves the natural and cultural resources and values of the National Park System for the enjoyment, education, and inspiration of this and future generations.

**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 employed qualitative and quantitative techniques to shape the insights and recommendations of the 2024 Park Partners Report. Initially, we surveyed park partners to collect data about a range of issues, including financial results in fiscal year 2023. We then analyzed publicly accessible 2022 IRS 990 tax returns to supplement data for organizations who did not fill out our survey. This approach augmented our survey findings, enabling us to use combined data from the survey and Form 990s to estimate revenue and expenses of a broader swath of the park partner community.

## Survey

We launched the survey in January 2024 and sought participation from the 470 organizations we had identified as park partners. The survey covered topics such as partners' priorities, achievements, challenges, contributions to national parks, and financial details for the fiscal year 2023. To monitor evolving trends, we incor-

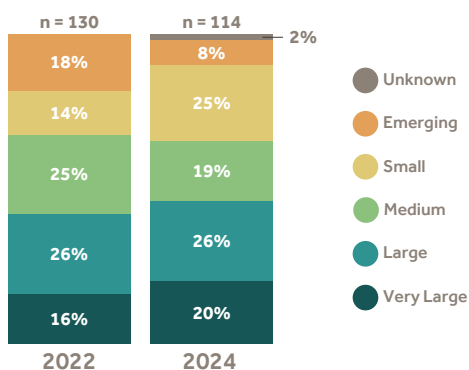
porated many questions from the 2022 survey. We also added several new questions, including questions to better understand park partners' relationships with NPF and the Friends Alliance. For the complete list of survey questions, see Appendix D.

114 organizations responded to the survey with some variation by question (compared to 130 in 2022).

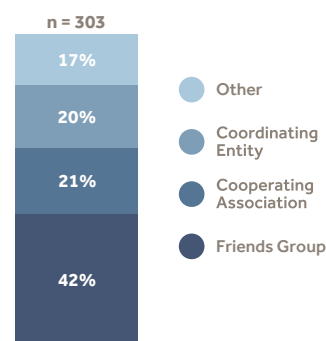
## Form 990 Analysis

To estimate the total revenue and support to national parks 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 2022 report, we collected Form 990s for as many organizations as possible to gather data on revenue, expenses, and employees. Organizations that generate under \$50,000 in annual revenues are not required to file a form 990, so no form 990 is available for these organizations.

**FIGURE 11: DISTRIBUTION OF PARK PARTNER SURVEY RESPONDENTS BY SIZE**



**FIGURE 12: 2022 990 FORM AVAILABILITY BY CATEGORY**





The IRS had not yet released most 2023 990s at the time of this analysis. We therefore collected 2022 990s and extrapolated data to form 2023 estimates, detailed below. We collected 305 2022 Form 990s from ProPublica. 223 of those were for organizations that did not respond to the survey.

**Estimating 2023 park-related revenue and support to national parks**

We used a combination of survey and Form 990 data to estimate organizations’ 2023 revenue related to parks, as well as their total support to national parks. We first asked survey respondents to provide 2023 park-related revenue and support to national parks and used those figures for organizations who supplied them.

**Estimating revenue and expenses related to parks**

For organizations who did not respond to the survey, we used 2022 Form 990s to create 2023 estimates. We first used 2022 total revenue and expenses reported on 990s to estimate

park-related revenue and support to national parks (i.e. an organization may have \$1 million in expenses, but only spends 10% of that on support to national parks). We calculated the average percentage of work related to NPS by organization type by taking the ratio of “Total aid to NPS 2023” to “Total expenses 2023” from survey responses (Figure 13). In 2022, we used contributed revenue to calculate the average percentage of work related to NPS for cooperating associations. In 2024, the figure found from using contributed revenue was no different from the result (37%) of the “Total aid to NPS” method used for other categories. To keep cooperating associations consistent with other organization types, we used “Total aid to NPS.”

For each organization, we then applied the appropriate category average to their 990 total revenue and expenses figures. This resulted in an estimate of the total revenue and expenses for each organization directly related to parks. Some park partners filled out the survey question of “What percent of your work pertains to NPS” but did not fill out financial information, in which case we used their individual percentage to adjust the 990 rather than the group average.

FIGURE 13: AVERAGE PERCENT OF WORK SUPPORTING NATIONAL PARKS, 2021 AND 2023

CATEGORY	AVERAGE % OF WORK SUPPORTING NATIONAL PARKS 2021	AVERAGE % OF WORK SUPPORTING NATIONAL PARKS 2023
Cooperating Association	50% (contributed revenue percentage used)	37%
Coordinating Entity	72%	78%
Friends Group	59%	52%
Other	13%	27%

**FIGURE 14: PARK PARTNER GROWTH RATES IN SUPPORT TO NATIONAL PARKS AND REVENUE FROM 2022 TO 2023**

CATEGORY	AVERAGE % CHANGE IN SUPPORT 2022 TO 2023	AVERAGE % CHANGE IN REVENUE 2022 TO 2023
Cooperating Association	-10%	98%
Coordinating Entity	0%	34%
Friends Group	-33%	21%
Other	11%	87%

**Calculating a growth rate**

We then applied growth rates to the 2022 figures to estimate 2023 total revenue and support. We calculated an average 2022-2023 growth rate by organization type for both revenue and support using organizations that provided 2023 data in the survey and had 2022 Form 990 data available.<sup>23</sup>

23. We excluded several organizations from this calculation who showed outlier growth between their 2022 990 and their 2023 survey. We also weighted the averages by organization size.

# Appendix D: Survey Questions

Thank you for your participation in the 2024 Park Partner Report survey. The survey will cover the following categories and should take 30-60 minutes to complete.

1. Basic information
2. Organizational priorities
3. Tools for organizations
4. Financial metrics
5. Organizational capacity
6. Impact on parks
7. Opportunities for collaboration

We suggest gathering your best sense of your organization's 2023 financials, including audited financials and IRS Form 990 if available.

You may save your progress and return to complete your survey at another time - be sure to use the same device and browser.

## 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, including all 428 parks in the National Park System as well as places such as national heritage areas, national wild and scenic rivers, national scenic and historic trails, etc.**

**<https://www.nps.gov/aboutus/national-park-system.htm>**

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, e.g., Residential Environmental Learning Centers/Outdoor Schools)
5. Do you have any formal contractual relationships with NPS? Select all that apply.
- Philanthropic Partnership Agreement
  - Grant or Cooperative Agreement
  - Cooperating Association Agreement (selling products or services within or related to parks, distinct from a Cooperative Agreement or Philanthropic Partnership Agreement)
  - Official coordinating entity for river trail or heritage area
  - Partnership design and construction agreements
  - We do not have any formal contractual relationships with NPS
  - Other (please describe)
6. Does your organization work exclusively with NPS?
- 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 1-3 years, what are the top 1-2 priorities for you and your superintendent(s)? Please select up to 2 of the focus areas below and describe your most exciting projects planned.
- 21st century visitor experience: improving access and usability, restoring structures, modernizing visitation
  - Inspiring future park stewards: educating and welcoming youth to our national parks

- Conservation and climate resiliency: protecting land species and habitat; adapting to climate change
- Telling the history of America: inclusive storytelling, educating the public about our heritage
- Please describe your most exciting projects in the priorities you selected, or an additional priority.

**10.** What are your organization's biggest limitations to maximizing your impact on NPS? Select all that apply. For each option selected, please add any information or detail you would like to share. For example, if you select "lack of internal organizational capacity," we would be interested to know what types of projects or experiences typically drive this felt need.

- 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)

**11.** Is there any additional information or detail you would like to share about your answers to the question above on limitations?

## Tools for organizations

**12.** 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, please add any information or detail you would like to share. For example, if you select "marketing/communications/branding," we would be interested to learn what would be most useful (e.g., specific types of co-branding between organizations?)

- 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
- Government relations
- Other (Please describe)

**13.** Is there any additional information or detail you would like to share about your answers to the above question on areas of support?

**14.** Which National Park Service policies and procedures would your organization benefit from additional training or support? Select all that apply.

- Overview of NPS Director's Order 21
- Agreements with NPS
- Partnership Construction
- Best practices for a strong partnership with NPS
- Donor vetting
- Fundraising
- Other (Please describe)

### Financial metrics

**For all of the following questions, please use data for your fiscal year ending in calendar year 2023. If you do not yet have final or near-final data, please provide your best estimate. 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.**

**15.** Were your organization's 2023 revenues more than \$50,000? If your organization works on projects or programs outside of NPS, please estimate for work related to NPS specifically.

### Revenue

**16.** Please provide the following information about your organization's revenue related to NPS for the fiscal year ending in 2023. Enter a zero if you have no revenue in that category. Please also include your estimates for revenue for the fiscal year ending in 2024.

**APPENDIX D: SURVEY QUESTIONS**

CATEGORY	2023 ACTUAL	2024 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**

- 17. Did you provide at least \$50,000 in financial or in-kind support to the National Park Service in your fiscal year ending in 2023? Note: volunteer and service corps hours should not be included here.
- 18. Which of the following types of support did your organization provide to the National Park Service in your fiscal year ending in 2023? What do you expect your estimated support to NPS to be for the fiscal year ending in 2024?

CATEGORY	2023 ACTUAL	2024 ESTIMATE
Total aid to the National Park Service		
Direct funds to NPS		
In-kind contributions to NPS including land, conservation programs, and education programs (volunteer hours detailed below)		
Other aid to NPS (please describe)		

- 19. What were your organization’s total expenses for your fiscal year ending in calendar year 2023?
- 20. What is the size of your organization’s endowment as of January 1, 2024?
  - We have no endowment
  - Up to \$500,000
  - Between \$500,000 and \$1 million
  - Between \$1 million and \$10 million
  - More than \$10 million

- 21.** Does your organization work with volunteers? Exclude board members. [Select all that apply]
- No
  - Yes, and my organization co-manages our park's Volunteer-in-Parks program
  - Yes, and the number of volunteer hours that directly served my organization and contributed to NPS in 2023 was:

### Organizational capacity

- 22.** 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
- 23.** How many years has the leader of your organization been in that position?
- 24.** How many staff members did your organization employ on January 1, 2024? If your organization works on projects or programs unrelated to NPS, please estimate for work related to NPS. (Full-time paid, then part-time paid).
- 25.** How many net staff do you plan to add in the next 12 months? (Use negative numbers for projected staff reductions.)
- 26.** How many full-time equivalents did your organization have focused on fundraising as of January 1, 2024?
- 27.** How many board members does your organization have? Enter NA if your organization does not have a board.
- 28.** 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?
- 29.** What percentage of your organization's leadership (e.g., Executive Director, VPs) are...
- Black, Indigenous, or people of color?
  - Women or non-binary?
  - 50 years old or younger?



## Impact on parks

### Activities with the National Park Service

**30.** In which of the following activities or functions is your organization engaged with NPS? Select all that apply.

**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 and operating support**

- Public facilities construction
- New infrastructure and housing development (e.g., park staff housing, roads)
- Trail construction
- Other construction
- Operating support (e.g., visitor center staffing, park maintenance)

**Culture**

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

**Other (please describe)**

**31.** What steps, if any, has your organization taken to broaden the audience of your park over the past two years (e.g., increasing access for historically excluded groups, focusing on inclusive storytelling)?

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

## Opportunities for collaboration

**33.** How would you describe your organization's relationship with the National Park Foundation?

- Very strong
- Somewhat strong
- Neutral
- Somewhat poor
- Very poor

**34.** How has your organization's relationship with the National Park Foundation changed over the past 2 years?

- Significantly improved
- Slightly improved
- No change
- Slightly worsened
- Significantly worsened

**The National Park Foundation, National Park Service, and 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 be as specific as possible.**

**35. What suggestions do you have for the National Park Foundation?** (For example, are there opportunities for NPF to collaborate more directly with partners on specific projects? Are you interested in opportunities for joint fundraising? Also, if you are a grant recipient of the National Park Foundation, we welcome comments on NPF's grant process.)

**36. What suggestions do you have for the National Park Service?** (For example, are there opportunities for NPS to strengthen the partnership? Are there specific trainings that NPS staff would benefit from? What gaps are there in your partnership with NPS?)

**37. What suggestions do you have for the Friends Alliance as it grows?** (For example, what opportunities for networking and peer-to-peer learning can the Friends Alliance provide? What topics would you like to see emphasized? What services and events would be helpful to build your work with your park site?)