

## Organizational Analysis of the Erie to Pittsburgh Trail Alliance



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## Erie to Pittsburgh Trail Alliance

### History and Background

The Erie to Pittsburgh Trail Alliance was incorporated in the Commonwealth of Pennsylvania as a 501(c)(3), tax-exempt, non-profit organization in 2008. In 2009, the Articles of Incorporation were amended to include the following stated purpose of the EPTA.

Erie to Pittsburgh Trail Alliance is an active coalition of trail organizations and individuals dedicated to the promotion, acquisition, development, and maintenance of a safe non-motorized trail network that connects the "Point" in Pittsburgh to the "Bayfront" in Erie. And that the "Erie to Pittsburgh Trail Alliance, Inc. will seek to improve the quality of life for communities along the trail network while stimulating economic development and recreational tourism activities."

Since its inception, the Alliance has operated as a volunteer organization under the exceptional leadership of James E. Holden who served as its initial president until his unexpected passing in 2013.

During those initial years, growth occurred quickly. Grants were being awarded, trails were being built, communities were being connected, and use of the trails grew dramatically. All of this placed greater demands on the volunteer board to keep up with the growth and to manage new challenges. As the Alliance entered its sixth year of operation, the Board became quite aware of the need to more strongly formalize its operational philosophies, policies, procedures, and operations in order to be successful into the future. Many saw the need for some type of planning to take place so that they would be able to clarify the Alliance's focus for growth and be able to clearly plan for their future.



One of the more challenging tasks the Alliance is encountering, is the need to build consensus among the dozens of trail organizations, communities, state agencies, and supporting groups who all have a vested interest in the future of the trail system.

The result was that in May of 2014 the EPTA submitted an application to the Pennsylvania Recreation and Park Society (PRPS), asking them to fund the development of a long-range strategic plan for the Alliance. The specific wording of the grant application was as follows.

In order to conduct EPTA strategic planning with a 2014 - 2020 time horizon, this RecTAP grant application seeks funding for professional organizational development consultant services by an individual or firm familiar with multiple-county recreational planning and development. The consultant will facilitate group planning sessions, draft and revise a written Strategic Plan, and draft and revise the 2015 Work Plan for EPTA. While the sequencing of work activities for this strategic planning will be negotiated with the selected consultant, here are the anticipated tasks: EPTA will provide consultant with background information as consultant requests; consultant will draft questionnaire for the Board; consultant will identify other long-distance trail alliances in Pennsylvania and provide that contact information; conduct in-person group facilitated session; draft strategic plan and circulate it; draft 2015 Work Plan and circulate it; conduct second in-person group meeting to adopt or revise drafts; incorporate final edits/comments into drafts; and provide EPTA Board will Strategic Plan and 2015 Work Plan ready for adoption.

Unfortunately, PRPS determined that the scope of work for a strategic plan was beyond the funding capabilities of a typical RecTAP Grant. They referred the application to the PA Department of Conservation and Natural Resources for their consideration for other state awarded grants. The concurrence was that, while the strategic plan may be what is necessary, the Alliance, as a non-profit organization, is not an eligible applicant for the DCNR Grants.

DCNR's recommendation was that PRPS award a RecTAP grant to begin the planning process for the Alliance. As part of the scaled back scope of services, the project would evaluate more clearly whether or not the strategic plan is necessary, and if so, would help the Alliance identify an eligible applicant to apply for a Peer-to-Peer Grant to continue the strategic planning process.

The result was that in Sept 2014 the Erie to Pittsburgh Trail Alliance was awarded a RecTAP Grant from the Pennsylvania Recreation and Park Society with the following scope of services.

- 1) Review EPTA's mission and goals;
- 2) Prioritize EPTA's goals and actions;
- 3) Develop cohesiveness and consensus building within the organization; and
- 4) Determine if additional assistance is needed through the DCNR Peer-to-Peer Grant Program or other DCNR programs, and if so, identifying a municipal applicant and providing assistance with the grant application's requirements.



## Specifics of the Proposed Scope of Services

1. EPTA will assign a sub-committee of three to five members to work with the consultant.
2. EPTA will provide consultant with background information, organizational bylaws, policies, procedures, operating procedures, meeting minutes (2013-2014), and all other pertinent information.
3. Consultant will conduct necessary research needed to amend or substantiate other analyses
4. Consultant will review and analyze the information described above and present his findings to the sub-committee.
5. Consultant will draft a questionnaire about EPTA's mission, goals, purpose, work plan, and actions to be disseminated to the full Board; collect and tabulate the completed questionnaire; review and analyze the results.
6. Consultant will meet for an extended workshop-style planning meeting with the full Board with the following agenda:
  - a. Present the consultant's findings and the results of his analysis
  - b. Build consensus within the Board concerning mission, goals, and actions
  - c. Determine steps to complete a full strategic plan for the organization.
7. Prepare a final report of the findings and recommendations

## Organizational Research

As part of the initial analysis of the EPTA, the consultant reviewed organizational documents and data that helped provide a picture of the Alliance and its operations. Among the items reviewed were the Articles of Incorporation, Organizational Bylaws, meeting minutes, financial information, policies, previous actions taken, vision, purpose, listings of partners, member organizations, and supporting agencies; maps, website, and much more.

## Organizational Structure

The organization is controlled by its Articles of Incorporation and its Bylaws. The original bylaws were adopted March 27, 2008 and have undergone two revisions, the most recent of which was July 22, 2014. The purpose of the organization as cited in the Bylaws is not comparatively word-for-word with that which is stated in the Articles of Incorporation. It does, however, refer to the Articles of Incorporation as the basis for its purpose.

The Board of Directors can range from 9 to 30 members who are elected by the Board from among current dues-paying members. Board members may not be compensated for their role as a director. According to the Bylaws, the only required meeting is the annual meeting. Generally, meetings are called by the President but may also be called by a quorum of the Board. Currently, the Board is meeting quarterly. The established quorum for any Board meeting is 25% of the sitting directors. A simple majority of the quorum is required for Board action to be taken.

Officers of the Board are to consist of a President, Vice President, Secretary, and Treasurer. Others are permitted as determined by the Board. The President serves as the Chief Executive Officer and roles are defined in the Bylaws for each of the other officers.

The Executive Committee, as defined in the Bylaws is granted permission to act on behalf of the Board between meetings. The Committee, however, may not: 1) Amend or repeal any resolution of the



Board; 2) Act on matters committed by the Bylaws or a resolution of the Board to another Committee of the Board; 3) Fill vacancies on the Board; or 4) Adopt, amend or repeal any portion of the Bylaws.

The Bylaws address other matters necessary for description, control, and operation of the Board.

## Vision, Purpose, Goal, and Role

### Vision

The Erie to Pittsburgh Trail Alliance (EPTA) is an alliance of non-profit organizations, municipalities, and other organizations actively involved in the acquisition, development and maintenance of non-motorized trails and safe, well-marked bicycle and pedestrian routes in Western Pennsylvania and southwestern New York.

The **purpose of the Erie to Pittsburgh Trail Alliance, Inc.** is to assure the construction, maintenance and use of a multipurpose trail network connecting Erie, Pennsylvania to Pittsburgh, Pennsylvania.

The **primary goal** of the Alliance is to establish a continuous trail from the Erie Bayfront to Point State Park in downtown Pittsburgh. Taking advantage of existing trails wherever possible, the route would follow the Seaway Trail from Erie eastward to Brocton, NY, before turning south to connect with the Oil Creek State Park and Allegheny Valley Trails on its way to Pittsburgh. By linking the Seaway Trail in the north (which already connects to the Erie Canal trail across the state of New York) to the Great Allegheny Passage in the south (which leads from Pittsburgh to Washington, DC) cyclists will be able to enjoy over one thousand miles of nearly continuous trail in an arc from Albany to the nation’s capital. The existence of this through route is likely to stimulate the development of numerous feeder trails to link smaller communities across northwestern Pennsylvania and upstate New York.

The **Alliance’s role** is to advocate for the continuous trail, assist the partners by sharing expertise and resources, and promote the use of the trail as a system. The purpose of the trail is to improve the quality of life for local residents and to stimulate economic development for communities along the route through recreational tourism.

### Finances

With limited sources of funding, the EPTA operates on a very small budget. The 2014 income and expense report shows a total income for the Alliance of \$3,390 and expenses of \$1,006. They had a beginning balance of \$3623 leaving the 2014 closing cash balance at \$6,007.

Membership receipts accounted for the largest annual income totaling \$2065. The only other revenue category was from an event held in 2014 by the organization. Cash receipts in that category totaled \$1,325. Expenses for 2014 were for the Jim Holden Memorial Ride,

EPTA Financial Resources	
Revenues	Amount
Trail group revenues (dues)	\$900
Business and family revenues (dues)	\$1165
Event registrations	\$1325
<b>Total Revenues</b>	<b>\$3390</b>
<b>Expenses</b>	
Event	\$687
Internet	\$119
Professional services	\$200
<b>Total Expenses</b>	<b>\$1006</b>
2014 revenue minus expense balance	\$2384
Jan 1, 2014 beginning balance	\$3623
<b>Dec 31, 2014 ending balance</b>	<b>\$6007</b>



webhosting for the Alliance's web page, and professional fees.

In 2014, the Alliance revamped the membership program in hopes of drawing additional revenue while encouraging more involvement from individuals, families, businesses, and organizations. They were also awarded the RecTAP grant in the amount of \$2500 but most of the funds will not be distributed to the Alliance until 2015.

## **Policies, Procedures, and Purpose**

The Alliance has good procedures in place for the ways they manage board meetings, gather reports from member organizations, record and control their finances, and manage general operations. They have approved policies for use of the EPTA logo and for potential conflicts of interest for directors, officers, and committee members.

The Alliance also has a clearly established vision, purpose, goals, and role from which they operate. Each of those is described earlier in this report.

As the organization continues to grow in scope, operations, demand for funding, programming, and management, it would be wise to establish a more systematic approach to operations. This would include methods for establishing system-wide priorities, goals, and planning. It is understandable that each individual trail organization or municipality needs to establish goals and objectives for their own section of trail and related amenities. The Alliance, however, must create policies, plans, and methodologies that will provide it with clarity in decision-making for the bigger picture of the trail system.

## **Clarifying Vision and Purpose**

A three-step process was used to assist the Alliance in reviewing, clarifying, and confirming its vision, purpose, and goals. Each step is described in the following narrative.

### **Committee Meeting**

The EPTA Board of Directors appointed a four-person sub-committee consisting of Ron Steffey, President; Tom Baxter, Treasurer; Marilyn Black, Secretary, and Barney Scholl, Legal Advisor. On November 24, 2014, the sub-committee met with consultant Bob Good to begin the planning process.

This meeting was used to assist the consultant:

1. Understand the purpose and objectives of the RecTAP
2. Become familiar with the structure and operation of the EPTA
3. Identify the issues that need to be addressed
4. Determine next steps in the process

In describing the **purpose and objectives of the RecTAP grant's scope or work**, the committee identified the following:

- To position the Alliance to proceed with the completion of a strategic plan.
- To examine and affirm the mission of the Alliance
- To evaluate the role of the volunteer board versus the use of paid staff or consultants/contractors to assist with the work of the Alliance



- To develop consensus on the goals and purposes of the organization
- To provide the foundation for moving into the future
- To project what the organization might look like in five years

As well, the committee identified that the primary roles of the Alliance are:

- Information sharing among members
- Advocacy
- Providing the general public with information about the trail system
- Building identity – branding
- Serving as an overseer or coordinator among the various trail owners/managers, as well as outside agencies
- Coordinating with regional and statewide trail systems
- Acting on behalf of the group of trail owners/managers

In discussing the **structure and operations** of the Alliance, the committee confirmed much of the analysis the consultant had previously conducted, which is described earlier in this report.

A number of **significant issues** that need to be addressed as part of the eventual strategic planning process were identified by the committee. They included:

- Build consensus among Alliance members as to the purpose, function, and role of the Alliance
- Develop strategies and policies that will provide long-term direction
- Develop methodologies for establishing priorities
- Encourage full participation among members of the board
- Complete a segment-by-segment analysis
- Complete a trail gap analysis
- Develop a broad, long-term vision for the Alliance
- Identify a list of what should be top priorities of the Alliance

The Committee identified the following “next steps” for moving the project forward.

1. Develop, distribute, collect, tabulate, and analyze a survey of all Board members related to Board priorities, purpose, function, and operations
2. Present the consultant’s findings to the full Board
3. Build consensus within the Board concerning mission, goals, and actions
4. Determine steps to complete a full strategic plan for the organization.

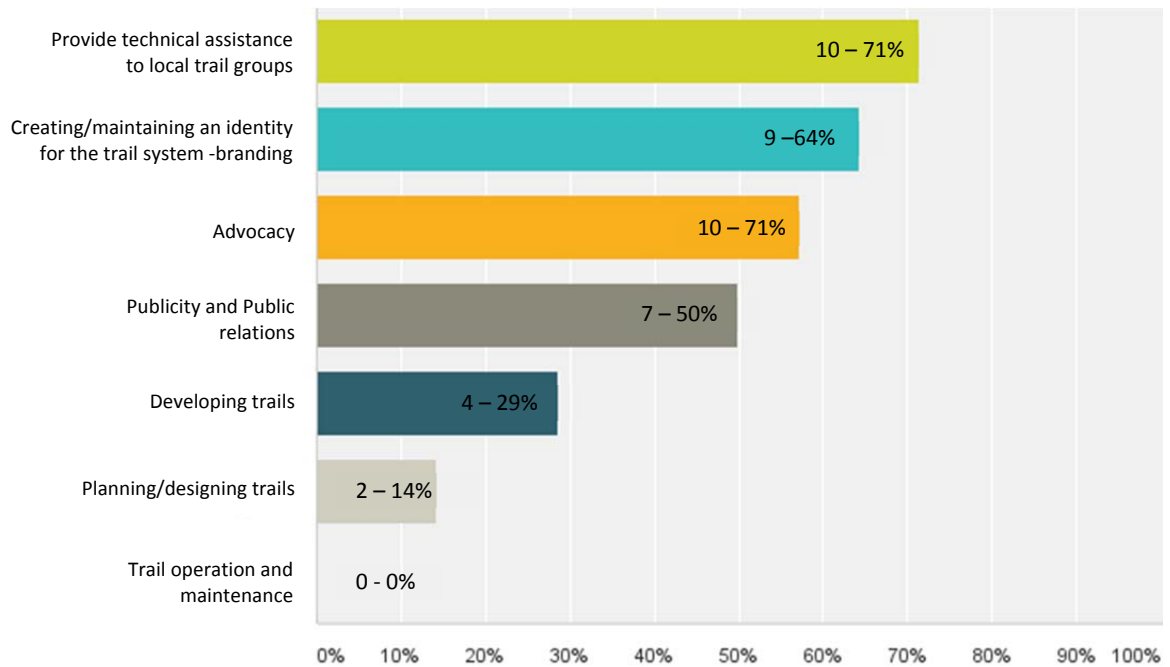
## Board Survey

In December 2014, a nine-question, digital survey was sent to each member of the EPTA Board of Directors. Fourteen completed and returned the survey.

Four of the nine questions were multiple choice or “check box” questions, some of which also allowed for additional comments. Each of the first four questions and their responses are shown on the following pages.



## 1. What should be the primary purposes of the EPTA?



## 2. Rank each of the following statements according to their level of importance by checking the appropriate box in the chart below. The EPTA should:

	Not Important	Somewhat Important	Important	Very Important	
Represent the Erie to Pittsburgh Trail with outside trail organizations, state government agencies, etc.	0.00% 0	7.14% 1	21.43% 3	71.43% 10	Rank #1
Provide design standards/ prototypes for kiosks and signage	7.14% 1	35.71% 5	14.29% 2	42.86% 6	Rank #3
Set priorities for trail planning and development	0.00% 0	28.57% 4	35.71% 5	35.71% 5	Rank #2
Plan and develop trails	35.71% 5	28.57% 4	21.43% 3	14.29% 2	
Own trails, where other agencies are not available or willing	35.71% 5	42.86% 6	21.43% 3	0.00% 0	
Maintain trails	71.43% 10	28.57% 4	0.00% 0	0.00% 0	

The chart above shows top rankings according to the most votes for important and very important.

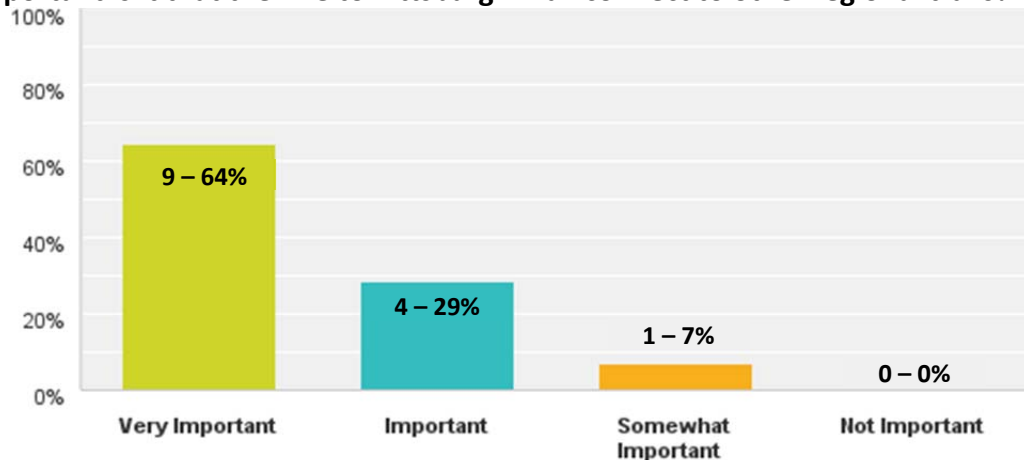


3. Rank each of the following statements according to their level of importance by checking the appropriate box in the chart below. EPTA should assist trail organizations, municipalities, and other trail owners in:

	Not Important	Somewhat Important	Important	Very Important	
Develop a top ten gap analysis to be completed in the next 5 years	0.00% 0	21.43% 3	7.14% 1	71.43% 10	Ranks #1 in VERY IMPORTANT
Identifying gaps in local trails that need to be closed	7.14% 1	21.43% 3	7.14% 1	64.29% 9	Ranks #2 in VERY IMPORTANT
Identify a travelable Erie to Pittsburgh Trail route with recommended detours for unfinished sections	0.00% 0	7.14% 1	35.71% 5	57.14% 8	
Securing funding for trails	0.00% 0	7.14% 1	50.00% 7	42.86% 6	Ranks #1 in Combined categories
Planning trails	0.00% 0	14.29% 2	50.00% 7	35.71% 5	Ranks #2 in Combined categories
Developing trails	14.29% 2	35.71% 5	35.71% 5	14.29% 2	
Maintaining trails	42.86% 6	42.86% 6	14.29% 2	0.00% 0	

In evaluating this chart only according to the Very Important category the two issues related to gap analysis show as significantly more important than any other issue. However, when combining the Important and the Very Important categories, trail funding and planning rank respectively as number one and two.

4. How important is it that the Erie to Pittsburgh Trail connect to other regional trails?



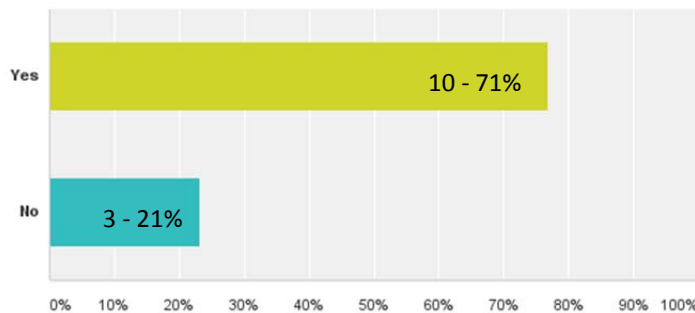
The remaining five questions requested written narrative answers.

**5. What are the greatest benefits you derive from the EPTA?**

- a. Knowledge of what other groups are doing. Personally, as a way to promote a connected trail system. As the system fills out, benefits will be better opportunity for bicycle touring in western PA.
- b. Advocacy.
- c. EPTA is the umbrella organization that looks out for all the smaller trail systems that make up the longer Erie to Pittsburgh Trail. I look to EPTA for guidance and standards. Each smaller trail section/trail organization can benefit from the big picture planning done by EPTA and the combined knowledge of our western PA trail blazers.
- d. Learning from other trail organizations
- e. Important to connect to large trail systems such as the Great Allegheny Passage.
- f. Support, advocacy, guidance.
- g. The greatest benefits derived from EPTA are: 1. making the individual trails part of a larger vision. This enables funding for larger projects that would be a much lower priority if it were for the individual trail instead of the Erie to Pittsburgh Trail. Trail opponents are making less noise because they know the fight is with more than just the local trail group. 2. Knowing that others have many of the same problems with adjacent land owners, politicians, and the general public. 3. Provides energy and "Can Do Attitude" when you see other EPTA groups "closing the Gaps".
- h. Increased priority by multiple funding agencies to achieve complete construction of all segments of the EPT. Exchange information (unfiltered) among trail organizations and funding agencies. Recharge the mental and emotional batteries of the volunteers and staff who are with EPT member entities, by interacting frequently and informally with their peers.
- i. Learning how others are acquiring funding for trail development and maintenance. The advocacy assistance for trail development that the EPTA provides assist greatly when applying for funding, and or during the planning stages of trails especially since the state recognizes this network of trails as a "mega-greenway." Providing a sense of being energized after the meetings, and yet realizing that there is still much to be accomplished by this small group.
- j. So far, EPTA membership hasn't helped with anything I'm aware of.
- k. A place for touring bicycle travel.



**6. With limited volunteers stepping up to assist, it is difficult for the EPTA Board to fulfill its ongoing mission. Do you support the EPTA hiring and/or contracting for services with people or organizations to assist in performing the work of the organization?**



While ten of the fourteen respondents said yes to this question, many had comments that affected their answer. One person did not answer this question. The following are the comments.

- a. That would most likely require raising membership fees which would make participation of trail groups even more difficult.
- b. Generally no. The mission should be helping member trails with their work, not operational functions that require staff. This mission is better carried out by volunteers with vision. Adding paid staff tends to make volunteers feel less needed. I would make exceptions for specific system-wide tasks such as branding and consistent design standards. These exceptions should be individually justified, system-wide in scope, clearly be limited in scope and time, and demanding of professional expertise.
- c. I support the hiring of an experienced, knowledgeable staff person if funds are available to pay for this position(s).
- d. EPTA must depend on the trail organizations along the alignment to be engaged, involved and maintain and develop the sections.
- e. Perhaps look to Allegheny Trail Alliance on how this may be structured.
- f. Along with adopting a strategic plan, a very clear chain of command, goals, funding, and duties would need to be adopted prior to EPTA becoming an employer or committing to a contract service.
- g. Recommend divide up specific responsibilities/duties. For example, maybe website maintenance by Council on Greenways and Trails, grant management via Friends of the Riverfront, and publicity/promotion via Oil Region Alliance.
- h. The greatest amount of work performed by the EPTA is by those directors that are paid by their employer to participate in the group. Many important tasks need to be accomplished, but there is a lack of manpower to take these things on. A paid person would provide a single initial point of contact for the public, which would enhance their experience dealing with the EPTA, and a more direct way to inquire about the trail conditions along the network. It would be fantastic to have a newsletter that can be produced quarterly (perhaps) that is sent directly to paid members. We need someone responsible for handling the social media sites, and



website on a day-to-day basis. A paid position could likely add credibility to the EPTA, as we would be seen as a more formal organization.

- i. Paid staff is really the only way to get much done. BUT, where does the money come from to pay the staff? I don't believe tapping the membership is a good idea.
- j. That is a very hard question to answer. Once you start hiring/contracting the volunteer effort tends to dry up with an attitude of let the staff do that. Any hiring or contracting should be for a specific limited scope task. Hiring of an executive director/general support type should only occur if funding is secured for at least four years.

7. Describe what EPTA could do to better meet your trail needs.

- a. Until the trails are connected the only thing that really helps is referrals and advertising of member trails.
- b. Develop and share standards for signage programs, maintenance and trail building. Consistent signage and trail surfacing will tie the shorter existing trails together. As on the GAP, you will recognize the Erie to Pittsburgh Trail as one long trail system.
- c. Identify gaps; create priorities for development; complete a comprehensive strategic plan; promote the completion of the gaps.
- d. Develop a Strategic Plan that includes goals with timelines. Celebrate our successes!
- e. #1 -- Keep EPT website up to date. #2 -- Provide graphic standards manual for kiosks, EPT signage, etc. #3 -- Continue providing letters of support to member entities and to other project partners to achieve the complete engineering, construction, and then ongoing maintenance of all EPT segments. #4 -- Consider affiliating on a permanent basis with NW PAssages, so that all EPTA members receive subscriptions to this monthly emagazine about greenways, recreation, and heritage.
- f. 1. Advocate for an agreement amongst groups for trail maintenance. 2. Where there is resistance to trail development, advocate strongly for this section of trail. 3. When EPTA member organizations are submitting funding request to the state and federal government for trail development, it would be very helpful if EPTA Board members could contact their elected officials and request their support of these request. Although EPT trail organizations do receive funding through these sources, it appears the biggest share (especially of state funding) goes to projects located on the eastern side of the Commonwealth.
- g. My trail needs good solid information on sources of funding and ways of finding matching funds.

8. What would make EPTA meetings more beneficial to your organization?

- a. Outside speakers, help with standard agreements, sharing of problem solving, notice of fundraising opportunities and sharing info on fundraisers that work well.
- b. More time for exchange of knowledge about design, operation, and maintenance. For example, allocate time each meeting for exchange of knowledge on a specific topic such as tunnels, ATV control, historical interpretation, event management, volunteer tracking, etc. the idea would be for each member to come with questions and ideas ... Not for someone to be tasked with a presentation.
- c. I think the current format works. Each smaller trail group has the opportunity to bring back to their group information made available at the EPTA meetings. I also think the



quarterly schedule and the alternating locations work well. Members are able to become familiar with sections of the trail other than their own.

- d. As a non-paid volunteer who often pays his own travel expenses to EPTA meetings, it makes it almost impossible to also give up work time as someone who is self-employed to attend meetings during normal work hours. I would ask that at least half the meetings occur in the evening or weekends and those paid attendees work out flex time with their respective employers.
- e. Board training. The EPTA Board is largely intelligent and highly motivated volunteers. The Board has the ability to be more effective if there is an understanding how best to operate and make important decisions.
- f. Bring in resources to help us achieve our goals, i.e. government, technical, etc.
- g. More information from the local trails, committees, and others being distributed to the Board and others as Attachments in emails a week prior to the quarterly meetings. This would lead to a more informed decision making process while enabling networking outside of the meeting time.
- h. Somehow get the quieter members to attend and participate more. Periodically invite in guest speakers (especially funding agencies) and/or have member representatives give a more detailed case study or information sessions on a particular topic.
- i. Meetings are very long; written reports from trail organizations with any information they want to share and distributed prior to the meeting. Specific topics could be discussed in more detail if there is a need for additional information on a project, or an issue that the Board may be able to assist with. Guest speakers on topics of interest that have been decided on by the EPTA Board.
- j. I would like to hear ways trail builders overcame unusual situations. Just one or two per meeting.

#### 9. Provide additional Comments

- a. It is important that we continue to define what we want to do, how we plan to do it, and how we plan to fund what we want to do.
- b. EPT should more aggressively conduct a membership campaign during 2015. Some of the increased activities desired by EPTA will entail a higher budget than presently. Thus, grantsmanship on behalf of EPTA is also needed. Some grants will require municipality(ies) as grant recipients for EPTA in order to increase probabilities of grant approvals and higher grant dollar amounts.
- c. I believe the EPTA evolved quite quickly, and became somewhat stagnant. In 2014, the group appears to have become more energized; wanting to move forward, but without a plan or specific goals we are not able to prioritize tasks. I can see the BODs (at least for the most part) have the vision and passion to complete the network of trails that constitutes the EPT. However, there are several thoughts on what the group should be focusing on, I believe the analysis that we are currently undertaking will assist somewhat with this issue. The EPTA currently have minimal written policy and procedures. Having these written documents would definitely assist the EPTA in decision-making; provide assistance to the Executive Committee when handling issues and requests that may arise between meetings. The EPTA has been very passive in maintaining non-paid and inactive board members this has led to the issue of not reaching a quorum at many meeting in the past. Recently, the bylaws were changed to



what constitutes a quorum, and the Board has discussed the non-paid Board positions. However, we still have yet to address Board positions that have not had any representation (or minimal representation) over the years. We need active Board Members, one to have their opinions heard, secondly, to take on some of the many tasks that need to be taken on. I believe branding of the trail network should be a priority, yet not take away from the local trail brand and support. It is my belief that the EPT should officially to determine how we are going to brand the trail (some groups are already installing signage along their trail), but is this signage what everyone feels should be used – I do not believe there was an official action on this; I believe the action was groups could use the EPT logo on signs along their trail. In addition to signage, I truly believe we should utilize similar kiosk for the consistency that the trail user can easily identify a kiosk and know the type of information they can acquire. The last item in my thoughts is a paid staff person; I believe this could definitely streamline many things, but I believe we would have to be very careful as to what the job responsibilities would be, and that this person does not end up handling tasks for specific trail organizations that are not within the job description.

- d. Except for using EPTA and the regional trail as an additional reason for grant funders to approve our application, EPTA doesn't do much for us here in New York. Funds are available in Pa for trails. There are basically no state monies for trails in NY. TAP and the Recreational Trail Program and others like them are federal programs the state administers and diminishes. I hope I'm overlooking a good reason for EPTA to be important to us, but haven't found it yet.

## **Board Discussion**

At the January 21, 2015 meeting of the EPTA Board of Directors, the consultant led the Board through a series of information gathering and analysis actions. The purpose of these was to gain a clearer understanding of the perception of existing conditions and to build consensus for next steps.

## **SWOT Analysis**

The first activity with the Board was to conduct a SWOT Analysis; an analysis of the strengths, weaknesses, opportunities, and threats that impact the EPTA. The Board identified the following.

### ***Strengths***

- Strength in numbers
- Vision
- Trust
- General sense of cooperation
- Shared goals
- Shared experience
- Real in a cyber-world
- Shared passion
- Respect for each other
- Variety
- Complementary strengths
- Actual success to build upon
- Synergy
- Celebrate successes
- Non-competitive
- Statewide recognition
- Volunteers
- Identity and the EPTA

### ***Weaknesses***



- Some absences in representation on the EPTA Board
- No sugar daddy...yet
- Varying levels of trail completion
- Difficult political climate for trails
- Variable local political support
- Lack of consistent trail surface, maintenance, signage, kiosks, access points, parking, etc.
- Lack of capacity (depth) – even at the Board level
- Limited number and skills of volunteers
- Volunteers lack credibility with lawmakers, funders, planners, etc.
- All volunteer driven
- Willing new property owners
- Public recognition and identity
- Long-range financial sustainability

### ***Opportunities***

- Making new connections
- Expanding the membership base
- Strengthening the partnership with the Power of 32 – funding sources, gap analysis
- Societal trends and moving more and more toward bicycling and walking
- The general public is paying more attention to public health through outdoor recreation
- A stronger connection with Dr. Freddie Fu
- Growth and connection with the Trail Town program
- Health foundations
- To better educate the general public and politicians– Scott Hutchison, Parke Wentling, Kathy Dalkemper
- Economic development/impact – promoting and implementing
- Corporate sponsorships, partners, and volunteers
- Day of giving and similar programs
- Beginning to develop organizational capacity
- Social media

### ***Threats***

- Liability
- Weak economy
- Return of the railroad
- Legislation and lawsuits regarding rail banking and related issues
- Outright opposition
- Misinformation
- Funding – long-term financial sustainability
- Lack of capacity
- Changes in elected officials with each election cycle
- Political amnesia
- Lack of ability to maintain trails



- Natural disaster
- Rules and regulations keep changing (DEP and others)

This analysis provides a good overview of the EPTA and its operations. It serves as the basis from which the Board confirmed their vision and considered their purpose; and from which they will move toward a full strategic plan.

### Identification of the “Top Ten” Priorities

Based on the discussions for the SWOT analysis and the board survey, the following “Top Ten” Priorities were agreed upon.

- Provide **technical assistance** to member organizations and municipalities
- Serve as an **advocacy** agent for the trail and trail organizations
- Represent the trail group** to the general public and to other trails organizations, funders, state agencies, etc.
- Establish **system-wide priorities**
- Determine routes** to be included in the Erie to Pittsburgh Trail system
- Plan for the big picture** while assisting local organizations in planning specific trails
- Build sufficient capacity** for the Alliance to remain focused on its vision and purpose
- Build identity - branding, publicizing, and promoting** so it becomes a recognizable trail system
- Identify funding sources** and assist local trails in securing funding
- Promote **networking opportunities** among trail organizations

### Establishing Goals and Actions

It was the consensus of the Board that the Top Ten priorities represent the Alliance well. It was further agreed upon a strategic plan is necessary to move the Alliance ahead in fulfilling its vision and accomplishing its goals.

Much of the data gathered as part of this initial study will be useful in the development of a strategic plan.

Typical steps for the development of a strategic plan are described in the box to the right. DCNR is generally willing to fund such planning efforts through their Peer-to-Peer Grants. These grants are

**Developing the Strategic Plan**

**Evaluate Current Conditions**  
Evaluate and analyze the existing organizational structure, operating procedures, physical resources, finances, partnerships, strengths, weaknesses, and deficiencies.

**Review similar trail organizations**

**Look to the Future**  
Describe what’s important to EPTA  
Define what success means to EPTA  
Assess and refine EPTA’s Vision Statement  
Identify opportunities and obstacles  
Consider board, volunteer, and staffing needs

**Establish Implementation Plans**  
Focus on the Vision  
Categorize issues  
Establish goals  
Determine priorities  
Develop implementation strategies  
Develop annual work plan  
Assign tasks  
Develop a system of accountability



funded independent of the typical DCNR grants schedule and process. A separate grant application process has been developed for these grants and DCNR will accept applications throughout the year. Applications must be submitted by a municipal applicant; generally, a municipality.

Allegheny County has agreed to serve as the legal applicant for any EPTA grants to DCNR and would likely be willing to serve that role for this grant as well. Other municipalities along the trail system were also suggested by the EPTA Board as possibilities.

## **The Strategic Plan**

The consultant presented the following description of the Strategic Plan.

### **Strategic planning launches a systematic approach to fulfilling the Vision of the organization.**

The process should develop a plan that is based on the vision/mission and goals of the organization. Generally, an analysis of existing conditions establishes the baseline from which to begin. Much of that baseline has been identified as part on this plan.

The diagram below helps to visualize the strategic planning cycle. It begins by asking five questions.

1. Where do we want to go?
2. How do we get there?
3. How do we measure success?
4. How did we do?
5. How can we improve?

The planning process begins by identifying goals, which could very well come from the top ten priorities identified in this report. The Alliance will then describe what the expected outcomes are of those goals. This helps to clarify what accomplishment of the goals will look like. Specific strategies are then developed that define the process for accomplishing each goal. The strategies will be specific, goal oriented, and measurable. As part of the strategies, we establish measures and targets that allow us to measure our degree of success. Finally we recognize our results and determine what needs to happen next. How can we improve or move on to the next steps.



# Strategic Planning Cycle



The Strategic Plan will establish a broad-based overall plan for the organization. From the strategic plan, annual or bi-annual goals should be created for accomplishment during the designated time period. These goals will be supported by defined strategies for their fulfillment.

The annual goal-setting process should be dynamic enough to allow for flexibility in each year's planning. For example, if funding becomes available for a goal that is not a priority for the current year, the process should be sufficiently flexible to restructure the goals to allow for use the new funding source. The same would be true if an unexpected volunteer were to come forward to work on a project that is not included in the current years goals or if unexpectedly land becomes available for a new trail, or for any other unanticipated opportunity.

As the process continues, the detailed strategies will accomplish the goals, which will ultimately result in fulfillment of the vision. And in the end, that is the purpose of the organization...to fulfill its vision.





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