

Erie to Pittsburgh Trail Alliance

Strategic Plan

2018

Adopted January 17, 2018



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Mission, Vision, Description

A most significant part of this strategic planning process has been to express who the Alliance is, its vision for the future, and its mission. Simply stated, the **Vision Statement** projects what the Alliance will look like in a future successful state; its **Mission** describes its reason for existence; and its declaration of “**Who We Are**” establishes the composition of the Alliance.

The combination of these statements is designed to hold the Alliance accountable to a clearly defined set of standards. All plans, activities, functions, and projects of the Alliance should be evaluated against these standards to ensure it is acting within its overall definition.



Who we are

An alliance of non-profit organizations, local municipalities, supporters, and advocates affiliated with the Erie to Pittsburgh Trail corridor.

Our Vision

A system of non-motorized, multi-use trails, and local connectors **linking Erie to Pittsburgh** through the experience of small towns, rural landscapes, historic sites, and cultural areas, tied to regional trails and beyond.

Our Mission

The Alliance's Mission is to advocate for the development of the continuous trail; to assist our local partners by sharing expertise and resources; to promote the trail for its regional significance; and encourage local and broader connections.

Key Issues

Based on statements of vision and mission, this Strategic Plan identifies four key issues on which the Alliance will need to focus in the coming years.

1. Operational and financial sustainability and success
2. Partner organization support
3. Looking beyond the Erie to Pittsburgh Trail
4. Advocacy, promotion, and education

Descriptions and recommendations for each area of focus are described in the remainder of this plan.

Key Issue #1 - Organizational and Financial Sustainability and Success

Building sufficient capacity to fulfill the EPTA's Vision

A demonstration of sufficient operational capacity includes:

- A strong administrative structure including the Board of Directors and staff
- An adequate budget
- Dedicated supporting partners
- Active accountability to partners
- Effective guiding priorities

Strategy A - Refine the role of the Board of Directors

The Board of Directors plays a significant role in the operations of the EPTA. They provide indispensable leadership, great numbers of volunteer hours, crucial expertise in many areas, tremendous passion for trails in western PA and beyond, and an unwavering commitment. Without the individual members of this Board, the EPTA would not exist.

Having said that, there is a need to more clearly define the role of the Board in order to ensure a clear focus on accomplishing its mission and fulfilling its vision.

Recommended functions of the Board

1. **Determine and ensure adherence to the Alliance's description of who we are; its vision, and mission** - It is the board's responsibility to create and sustain a vision and mission that articulates the organization's expectations, goals, purpose, and reason for being. **Advocate** for development; **assist** local partners; **promote** the trail; and **encourage** connections.
2. **Advocate for, work closely with, educate, and provide technical assistance to partner organizations and trail owners** – Provide direct assistance as it helps support the bigger purpose of the Alliance.
3. **Ensure effective planning** –Be actively involved in an ongoing planning process and work to implement and monitor the plans.

4. **Monitor and strengthen programs and services** - Ensure that all programs and activities are consistent with the Alliance's vision and mission. Monitor and evaluate for effectiveness.
5. **Hire and manage staff** – The Board is responsible to create necessary staff positions and to hire and manage so as to fulfill the everyday roles of accomplishing its mission and fulfilling its vision. The Board shall oversee and manage the Executive Director and other staff as required.
6. **Ensure sufficient financial resources** - One of the board's foremost responsibilities is to secure sufficient resources to fulfill the Alliance's vision and mission.
7. **Provide proper financial oversight** - Develop the annual budget and ensure that proper financial controls are in place.
8. **Uphold the fiduciary relationship between the board, its partners, and the general public.**
9. **Warrant legal and ethical integrity** - The board is obligated to adhere to legal standards and ethical norms.
10. **Build a competent and functional board** - Orient new members, and periodically and comprehensively evaluate the Board's performance.
11. **Enhance the organization's public standing.** Clearly articulate the organization's mission, accomplishments, and goals to the public and garner support from constituents and supporters.

The Pennsylvania Association of Non-profit Organizations (PANO) can also provide recommendations about other variations of board responsibilities.

Recommended changes to the EPTA Bylaws

Article 2.2 – Establish a specific number of Board members. Recommended number of 11 to 13. Set term limits at no more than six years and eliminate alternates.

Specifying a designated number of board members promotes continuity over the years by ensuring appropriate representation.

Article 2.7 – If the size of the Board is reduced, the quorum should be increased from 25% to 33%.

Article 2.14 – Allow removal of a Director for absence from a specified number of meetings.

Establishing term limits allows for an ongoing rotation of new and experienced members.

It is also recommended that the Executive Committee be granted clear authority to take specified operational actions on behalf of the full board between meetings.

Article 4.2- Appoint one Director to chair each committee as they are established. The Chair of the committee will serve as the liaison between the Board and the committee. The Committee will work on specific tasks assigned by the Board, through the Committee Chair, the Director. The Committee Chair will work with the committee, and bring the recommendations of the committee to the Board for consideration. Members of the committee, with the exception of the Director who serves as the committee Chair may include non-voting members of the EPTA. The committee shall be advisory in nature. Ultimately it is the Board of Directors responsibility to consider the recommendations resulting from the committee(s) work.

The number of committees and functions of the committees shall be decided by the Board of Directors as needed.

When considering who will be members of the Board, there should be a balance of those who are visionary and see the big picture with those who more detail oriented. As well, Board members will be needed with a variety of skills. Such skills should include administrative and organizational management; fundraising and relationship building; trail management, maintenance, and development; financial management and operations; marketing and outreach; and concern for local trail groups. Some with connections to outside organizations and agencies would also be beneficial as well as those with connections to potential significant donors. Special consideration should be given to securing board members who can lead each of the proposed committees of the board.

A potential list of committees to consider might include:

1. Fundraising/Partnership Committee
2. Outreach/Marketing Committee
3. Finance Committee
4. Trail Development Committee
5. Membership Committee

Strategy B - Assemble a staffing team to support the Board of Directors

The EPTA has moved beyond the point of ensuring ongoing success using only volunteers. While volunteers provide a tremendous service in fulfilling many of the functions of the Board, their time is limited and they have reached their workload capacity. The Board needs the support of paid staff whose jobs are exclusively committed to operations of the Alliance. Paid staff will provide the EPT with the capacity to focus on completing the gaps in the overall trail corridor; build relationships in gap areas; identify who will develop, own, maintain (long term) and partner with EPTA by cultivating and building new relationships with potential funders. This position should not duplicate the administrative functions which are already being performed by other organizations and volunteers.

Staffing recommendations

- Apply for a Circuit Rider position through the DCNR grant program.
- Recruit a part or full-time EPTA Director who will volunteer services for 2018/19. Pay a monthly stipend if available. Target 2019/20 to begin this as a paid position.
- Recruit a part-time volunteer Administrative Assistant.
- Recruit a volunteer to serve as outreach coordinator to establish a marketing, outreach, and education schedule for the EPTA.

VARIOUS STAFFING OPTIONS - CHOOSE WHAT FITS BEST

Direct hire

Create the legal structure within The EPTA to hire and manage staff.

Partner with other organizations

Contract with other related organizations to manage all staff functions – payroll, taxes, benefits, etc. EPTA should remain in control of job description, oversight, management, evaluations.

Share staff with other related organizations

Share a staff person with other related organizations who may be looking to hire additional staff but does not have the funds to do so. Such job-sharing would give EPTA an opportunity to have a staff person without the expense of full-time. The partner organization(s) would manage all staff functions – payroll, taxes, benefits, etc. EPTA should remain in control of job description, oversight, management, evaluations.

Independent contractor or consultant

Enter into a contractual agreement with an individual or company to provide defined tasks for a specific number of hours.

Utilize volunteer staff

Create a clear job description and recruit a volunteer to fulfill the role. A stipend may be offered as an incentive.

STAFFING

EPTA Director

Full-time or Part-time volunteer

Pay as the budget permits

Work a minimum of 50 hours per month

Develop a job description

Administrative Assistant

Part-time volunteer

Move to a paid position as funds are available

Work 30 to 50 hours per month

Develop a job description

Public Relations Director

Part-time volunteer

Move to a paid position as funds are available

Work about 30 hours per month

Strategy C - Develop and maintain a strong, realistic budget based on solid revenue projections and accurate expense projections.

Strong revenue sources must be identified and secured. Expenses can only be projected or incurred based upon corresponding revenue streams. Based on other recommendations of the plan, sufficient funds must be raised to pay a director, and to cover administrative, programmatic, and operational costs.

Primary sources of income may include

- Municipalities (county and local governments)
- Services that can be provided by the Alliance for a fee
- Membership fees
- Partner engagement
- Events, activities, and fundraisers
- Grants – government, private, foundations

Projected budget categories

- Revenue categories
 - Memberships
 - Partnerships
 - Corporate support
 - Grants
 - Fees for service (marketing, trail planning, grant administration, etc.)
 - Events and activities
- Expense categories
 - Staffing
 - Office support, supplies, etc.
 - Travel
 - Memberships
 - Marketing/Branding – Focusing on the Erie to Pittsburgh Trail Corridor
 - Training
 - Advocacy, promotion, education

Strategy D - Create a focused and intentional partner engagement process for the raising of sufficient funds

Building Sustainable Sources of Income

The raising of sustainable support should be the highest funding priority of the Alliance. The best opportunities for such support comes from building relationships with individuals, organizations, businesses, corporations, foundations, and agencies who will be financially committed to the EPTA for extended periods of time. These financial contributors become the EPTA's partners, providing the most sustainable source of income available.

Securing a financial contribution from a donor is just the beginning of the partnership. From that time forward, the EPTA Board must ensure, through building a strong relationship with the donor, that they feel that they are an integral part of the success of the Erie to Pittsburgh Trail. Ensuring this sense of belonging and of being a critical partner, must be fostered by the EPTA. Once the relationships begin, it becomes necessary for the EPTA Board to sustain that relationship for the long-term. While this does not mean that any donor will give every year, it certainly provides great engagement for on-going sustainability of their support.

This does not discount the solicitation of one-time contributions as they will also be of great value. Opportunities to solicit and receive contributions of any size or regularity are of great benefit to the Alliance. All must be appreciated and welcomed with strong gratitude.

While typical fundraising events will certainly play a significant role in funding the EPTA, the Board should guard against investing too much time in fundraisers that provide smaller, one-time contributions. Rather, fundraising events should be viewed as relationship building while raising funds. This too, becomes a more efficient, effective, and sustainable means of providing for the financial needs of the Alliance.

EPTA Partnership Program

EPTA partners can be defined as those who have a financial or significant resource investment in the trail or in the Alliance. These would include members of the Alliance, Erie to Pittsburgh Trail owners/operators, organizations who have significant funding investments in the trail; individuals, businesses or corporations that have made financial or land donations; and future investors toward the operations of the Alliance.

These partners have, and will continue to play a critical role in the on-going development of the trail and the success of the Alliance.

Partner engagement is not just about securing individual donations to the trail or the Alliance. It is more about developing relationships with partners such that they feel they are a significant part of the Alliance and its overall purpose.

Partners should be considered at multiple levels of engagement and balanced among the various levels of commitment to best serve the Alliance.

The accompanying charts display recommended contributions, target numbers, and amounts.

Partner Engagement			
Level of Engagement	Number	Amount Each	Annual Goal
Distinguished Partners	Four Partners	\$5,000 to \$15,000	\$50,000
Major Partners	Twenty Partners	\$500-\$4,900	\$15,000
Supporting Partners – Individual, family, business, agency, and organizations; sustaining partners and events sponsors	One hundred Partners and two events	\$25-\$499	\$10,000
Supporting Partners Contribution Schedule			
Individual Partner	\$25		
Family Partner	\$50		
Business/Agency/Organization	\$100		
Sustaining Partner	\$250		

This Plan proposes three levels of engagement.

Distinguished Partners would be large donors such as corporations, businesses, foundations, or governmental agencies that would make contributions of \$5,000 or more annually toward the on-going operations of the Alliance. The Board should seek such partners that may provide a multi-year commitment.

Major Partners are similar in nature to Distinguished Partners but at a lower monetary commitment rate. Once again, multi-year commitments would be best.

2019/2020 Partnership Goals
Two Distinguished Partners - \$10,000
Ten Major Partners - \$5,000
Supporting partners -
Events – Two major events

Supporting Partners include trail organizations, local businesses, individuals, and families that will generally commit to an annual contribution. This category also includes sponsors that contribute up to \$500 to support the Alliance’s events or activities.

It will likely take several years to build partner engagement to the target levels. It is generally more difficult to secure initial donors than it is to keep them. Thus the reason for focusing on relationships that will last rather than simply looking for donations.

In the immediate future, the expense side of the budget will be dictated by the ability of the Board to secure partnerships. We propose the Board target 2019/2020 as the first year to have significant partnerships. Partnership goals are displayed in the accompanying chart.

Recommendations

- Define the Board of Director’s role in partner development
- Raise funds through strategic development of long-term relationships with partners
- Recognize the role of trail segment owners and volunteers as foundational partners
- Clearly define the benefits of partnership

Strategy E - Ensure Operational accountability to members, partners and users

- Create an annual report
- Track achievements
- Report success stories
- Hold an annual gathering to celebrate accomplishments, report details, and present future plans to partners.

Strategy F - Establish system-wide priorities

- Generate a spreadsheet of trail segments, identifying levels of completions
- Define criteria to assist with determining trail development priorities
- Recognize the PA DCNR gap priorities when determining local plans and projects

Strategy G – Establish strategic agreements

Establish strategic agreements with organizations to ensure a clear understanding of the roles that each will play in cooperation with the EPTA. Such organizations may include:

- Oil Region Alliance
- Pennsylvania Environmental Council
- Industrial Heartlands Trail Coalition
- And other related organizations

Key Issue #2 - Partner Organization Support

Partner organizations are those who own and/or manage a trail segment along the EPT or connections to it. One of the most critical objectives for the future of the EPTA must be to provide strong support for all its partner trail organizations. These groups rely heavily on promotion, assistance, and encouragement from the EPTA. Therefore, EPTA must focus on supporting the groups in a variety of ways.

These could include, but not be limited to:

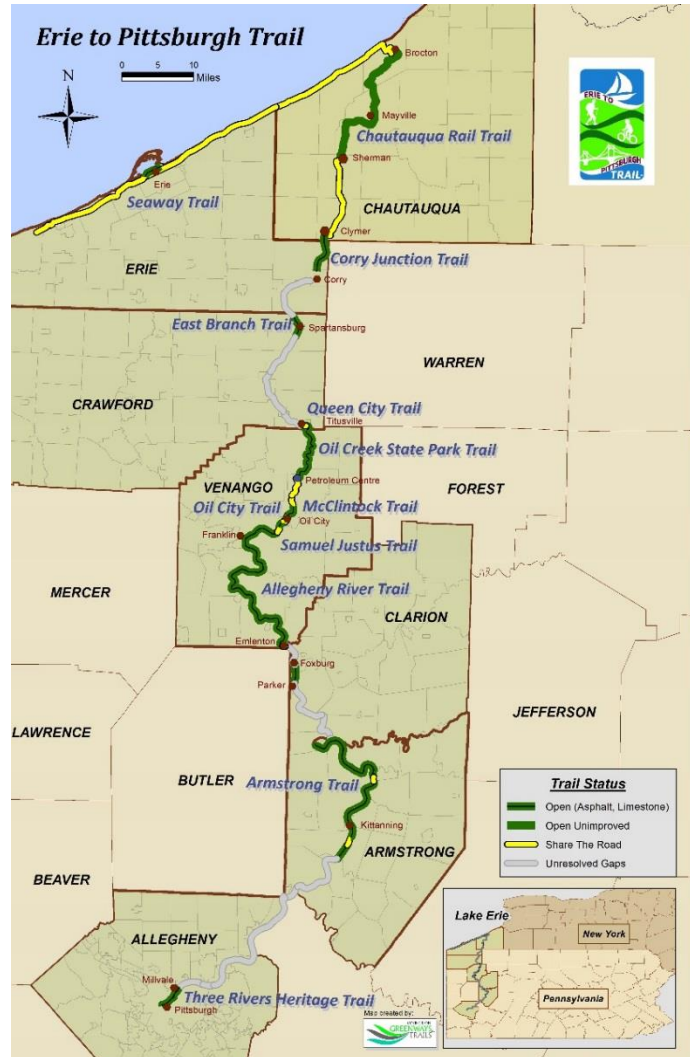
- Offering multiple opportunities to network with each other
- Providing technical assistance
- Conducting training programs
- Identifying funding sources
- Linking members to state agencies
- Educating in design, maintenance, operations standards
- Sharing successes and failures
- Supporting trail segments as part of the bigger picture
- Opportunity to have Board representation.

Such support could be provided by way of group gatherings, meetings with state representatives, on-site visits, individual meetings, seminars, and workshops, and more. Local groups should help define what the needs are and how they can best be addressed.

Key Issue #3 - Looking Beyond the Erie to Pittsburgh Trail (EPT)

While EPTA Board members should focus their time and efforts on the needs of the Erie to Pittsburgh Trail, it is important to consider how the trail is impacted by local connector trails as well as those that go far beyond western PA and southwestern New York.

- **Local connector trails** extend access to the Erie to Pittsburgh Trail into many communities and locations through which the EPT does not travel. These trails have potential to offer thousands of local users significant gateways to the EPT and beyond.
- The EPT is recognized across the Commonwealth as **one of Pennsylvania's Major Greenway Corridors**. As such, it makes connection to as many as a dozen major land and water trails in western Pennsylvania, ultimately connecting to other trails across the Commonwealth. EPTA should work closely with the statewide trail efforts to ensure the long-term and bigger picture success of PA's land and water trails network. It should also be one of the EPTA's publicity goals to market the trail according to its statewide significance and connections.





Through its trail planning efforts, PA DCNR has identified two segments along the EPT among the state's top 10 priority trail gaps that need to be closed. These are the Armstrong Trail's Brady Tunnel, priority ranked as #5; and the Oil Creek State Park gap priority ranked as #8. The Redbank Valley Trail, a connector to the EPT, also includes the Climax Tunnel as priority gap #4. Each of these should be priorities for the EPTA as well. The same gap list includes a dozen other gaps along the EPT in the statewide list of 248 priority gaps. See the full map and gap descriptions at <http://maps.dcnr.pa.gov/trailgaps/>.

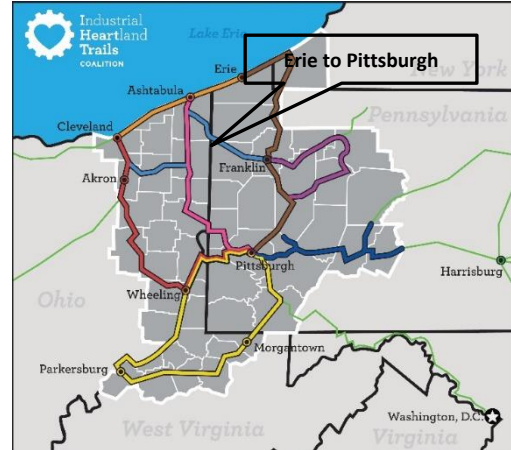
Regional Trail Connections

The Redbank Valley Trail is a 51 mile non-motorized, four-season trail that has been developed to connect the Redbank Valley to the EPT. It provides a critical link for residents of that region to connect to the regional trail system. Trail segments that complete or connect to the EPT, such as the Climax Tunnel, are funded more quickly, as completion of regional trail networks are a priority of PA DCNR. While the Mercer County Trails Association, Inc. was formed with the primary purpose of developing and maintaining multipurpose trails in Mercer County, it is largely behind the promotion of a western trail loop of the EPT. Once complete, it will connect from the EPT in Venango County through Mercer, Crawford, and Erie Counties, to the EPT in Erie.

While Redbank Valley Trail and the Mercer County Trails Association are examples used it is noted that there are many other connector and or spur trails to the Erie to Pittsburgh Trail.



The **Industrial Heartland Trails Coalition** “envisions a network of trails that stretch from the shores of Lake Erie to the confluence of the Three Rivers in Pittsburgh and on to the Ohio River in the Appalachian foothills of West Virginia” (ihearttrails.org). The eight identified trail corridors, of which the EPT is one, will ultimately provide over 1,400 miles of trails in the four-state region of Pennsylvania, New York, Ohio, and West Virginia. EPTA should be a strong partner in the Industrial Heartlands Trails Coalitions as it dramatically expands trail opportunities for all users of the Erie to Pittsburgh Trail.



Key Issue #4 - Advocate, Educate, Promote

The Alliance, as an organization that is directly connected with the entire Erie to Pittsburgh Trail system, is in the best position to advocate for it, educate about it, and promote it. Advocacy, promotion, and education affect most every aspect of the trail.

Advocacy demonstrates to partners and potential partners the benefit of their involvement with individual trail segments and the bigger picture of the overall trail. It validates the economic, social, environmental, and recreational value of the trail to businesses, individuals, organizations, and communities. And it reaches to a host of funding and resource agencies to garner financial support, publicity, influence, and recognition, locally and across the commonwealth and New York.

Education legitimately informs local communities, trail users, municipal leaders, supporters, partners, and regional alliances of the genuine cultural, economic, social, and transportation benefits to residents and visitors. It will also trains and informs trail owners and managers in the details of development, funding, operations, maintenance, and much more.

Promotion casts a vision that excites users, drawing them from far and wide for recreation, exercise, social interaction, outdoor enjoyment, travel, and much more. It brands the EPTA as a recognizable trail system that is enjoyable, picturesque, safe, well cared for, and exciting. A place for users of all ages and abilities; for solo users, couples, friends, and families; a place for everyone to enjoy.

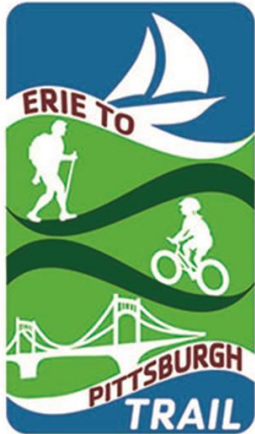
As a combined effort, advocacy, education, and promotion offer a comprehensive means of demonstrating the value of the trail to all who are impacted or support it.

Advocate, Educate, Promote to:

- General Public
- Local governments
- State and federal agencies
- Elected officials
- Businesses and corporations
- Organizations
- Funders
- Trail owners and managers
- Trail users and regional trails

Advocate, Educate, Promote for:

- Economic impact
- Community development
- Funding and financial support
- Health and recreation
- Fun and enjoyment
- Alternative transportation
- Regional impact and growth
- Social and cultural benefits



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Our Mission

The Alliance's Mission is to advocate for the development of the continuous trail; to assist our local partners by sharing expertise and resources; to promote the trail for its regional significance; and encourage local and broader connections.

Key Issue #1 – Promoting Organizational and Financial Sustainability and Success; and building sufficient capacity to fulfill the EPTA's Vision

Refine the role of the Board of Directors

Define the role and function of the Board of Directors.

Update the EPTA Bylaws to reflect the recommendations of this Strategic Plan.

Assemble a staffing team to support the Board of Directors

Recruit and hire a part or full-time EPTA Director who will volunteer services for 2018/19. Pay a monthly stipend if available. Target 2019/20 to begin this as a paid position.

Recruit and hire a part-time volunteer Administrative Assistant in 2018.

Recruit a volunteer to serve as outreach coordinator to establish a marketing, outreach, and education schedule for the EPTA.

Sustain a strong corps of volunteers - recruiting, recognizing, and supporting them.

Secure required funding for staff positions.

Develop and maintain a strong, realistic budget

Base the budget on solid revenue projections and accurate expense estimates.

Identify and secure strong, ongoing revenue streams.

Budget or incur expenses only when revenue sources are secure.

Create a focused, intentional partner engagement process to secure required income

Define the Board of Director's role in partner development.

Raise funds through strategic development of long-term relationships with partners.

Recognize the role of trail segment owners and volunteers as foundational partners.

Focus on sustainable revenue sources rather than one-time, low revenue fundraisers.

Concentrate on building partner relationships so they understand EPTA's overall purpose.

Target four levels of engagement – Distinguished Partners (\$5,000-\$15,000); Major partners (\$500-\$4,900); Supporting Partners (\$25-\$499). Clearly define the benefits of partnership.

Ensure operational accountability to members, partners and users

Create an annual report describing the year's activities; presenting a clear financial statement; sharing anecdotes.

Track achievements and share success stories.

Hold an annual celebratory gathering.

Establish system-wide priorities

Generate a spreadsheet of trail segments, identifying levels of completion and gaps.

Define criteria to assist with determining trail development priorities.

Recognize the PA DCNR gap priorities when determining local plans and projects.

Key Issue #2 - Support partner organizations

Partner organizations are those who own/manage a trail segment along the EPT or a connection to it.

Support and assist Partner Organizations by:

Listening to their needs and responding

Providing technical assistance

Identifying funding sources

Educating for design, maintenance, and operation standards

Ensuring a direct connection to the Board

Offering multiple opportunities to network

Conducting training programs

Linking members to state agencies

Supporting trail segments as part of the bigger picture

Sharing successes and failures

Key Issue #3 - Look beyond the Erie to Pittsburgh Trail

Consider how the Erie to Pittsburgh Trail is impacted by local connectors and trails that go far beyond western Pennsylvania

Focus the majority of time and efforts on the needs of the Erie to Pittsburgh Trail while intentionally pursuing and supporting local connectors and regional trails, and the bigger picture.

Recognize the EPT's significance in the PA statewide trail system and solicit support from Commonwealth agencies in furthering the plans of the EPTA.

Enhance the broader use of the trail by closing the gaps along the EPTA corridor. Many are identified by the PA DCNR's trail gap analysis and priorities. Included in DCNR's top ten are Armstrong Trail's Brady's Tunnel, Oil Creek State Park Trail, and Redbank Trail's Climax Tunnel.

Work with the Commonwealth and local trail organizations to promote local and regional trail connections. Current priorities include the Redbank Valley Trail and the Mercer County trails.

Key Issue #4 - Advocate, Educate, Promote

Advocate, Educate, Promote to:

General Public

Local governments and state agencies

Elected officials

Businesses, corporations, organizations

Funders

Trail owners and managers

Trail users and regional trails

Advocate, Educate, Promote for:

Economic impact

Community development

Funding and financial support

Health, recreation, alternative transportation

Regional impact and growth

Social and cultural benefits

Successful Implementation of this Plan

In an effort to ensure the ongoing success of this Strategic Plan, the Alliance should systematically identify and track its objective on a year by year basis.

Step 1 – Adopt this Strategic Plan and agree as a Board that the Plan will direct the Alliance over the coming years.

Step 2 – Utilizing the Key Issue identified in the plan, the Board should annually identify its goals to be accomplished for the coming year. Be reasonable, knowing that expecting too much can result in frustration and little being accomplished while expecting too little results in smaller achievements as well.

Step 3 – For each annual goal, appoint a Board member to lead the steps to accomplish the goal. Have the leader develop an implementation plan to accomplish the goal. A sub-committee of Board members and volunteers should be appointed to assist with the work of accomplishing the goal.

Step 4 – Establish a target for completion of each goal

Step 5 - The leader must be held accountable at each Board meeting to report on progress, describing what has been accomplished and what the next steps will be. If progress is slow, the Board should discuss how to adjust the process to keep moving towards accomplishment of the goal.

Step 6 – Celebrate accomplishment of each goal.

In order to ensure success of the Strategic Plan, the Board must:

- **Secure buy-in and support of the Strategic Plan**
- **Establish reasonable, annual goals**
- **Appoint qualified leaders and committees**
- **Hold leaders and committees accountable to accomplishment of their goals**
- **Hold to the Vision!!**

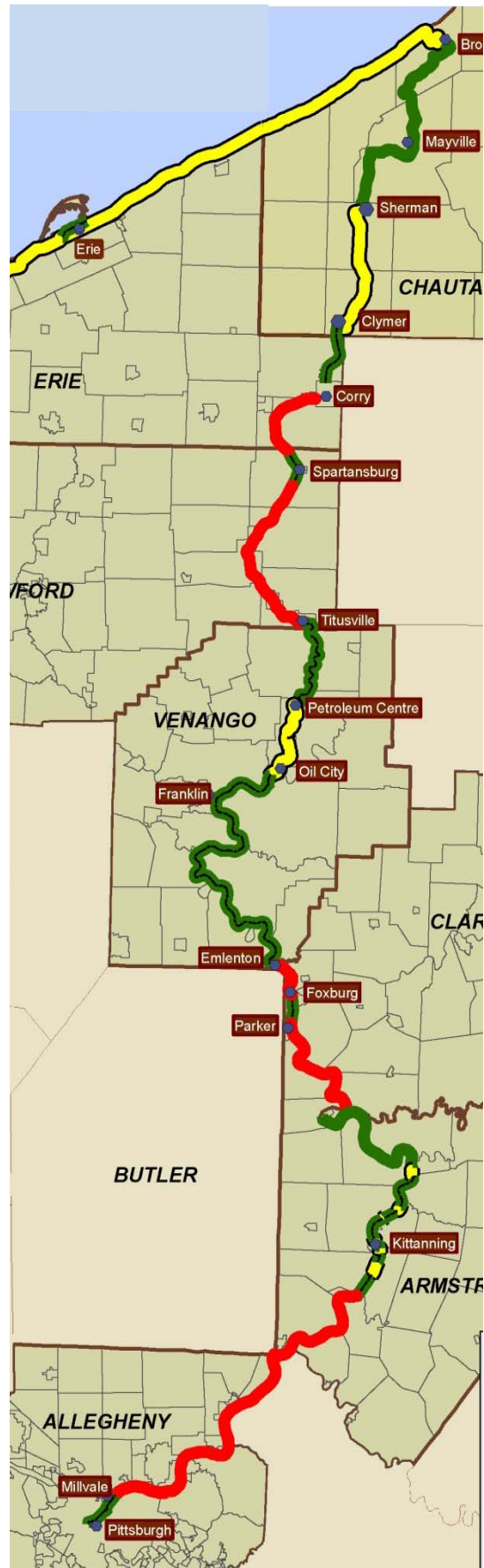
Organizational Analysis of the Erie to Pittsburgh Trail Alliance



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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
Total Revenues	\$3390
Expenses	
Event	\$687
Internet	\$119
Professional services	\$200
Total Expenses	\$1006
2014 revenue minus expense balance	\$2384
Jan 1, 2014 beginning balance	\$3623
Dec 31, 2014 ending balance	\$6007



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.

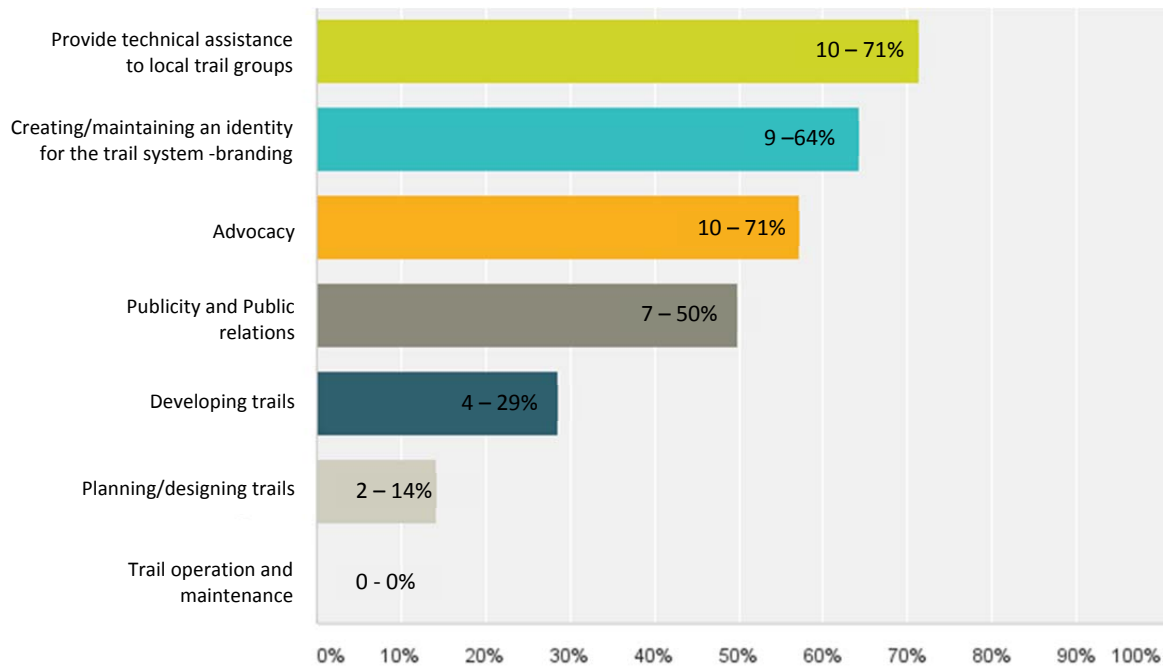
Board Survey

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.

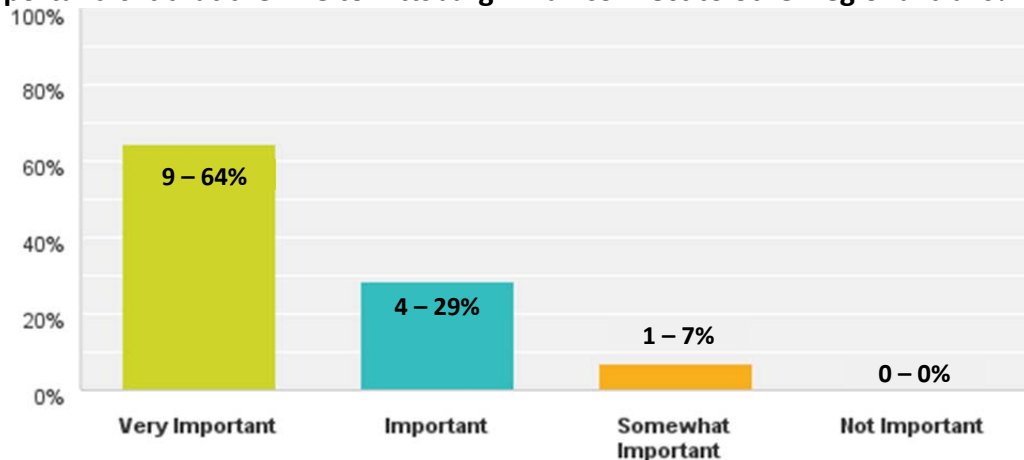


3. Rank each of the following statements according to their level of importance by checking the appropriate box in the chart below. EPTA should assist trail organizations, municipalities, and other trail owners in:

	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?



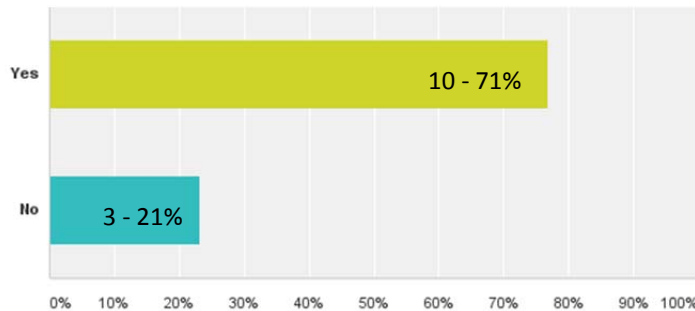
The remaining five questions requested written narrative answers.

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.



PASHEK ASSOCIATES

LANDSCAPE ARCHITECTURE | DESIGN | PLANNING

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