



Your Adventure Starts Nearby.

# STRATEGY ROADMAP

## North Country Trail Association

July 30, 2014



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## EXECUTIVE SUMMARY

The North Country Trail Association (NCTA), founded in 1981 as the primary partner of the National Park Service (NPS) which administers the North Country Scenic National Trail (NCSNT). The NCTA with an annual budget approximately \$800,000 and nine employees, consists of approximately 3,000 members, 25 chapters and 13 affiliated organizations. In April 2013, North Country Trail Association (NCTA or Association) embarked on a strategic planning process using the Real-Time Strategic Planning (RTSP) model developed by La Piana Consulting, published in the book, *The Nonprofit Strategy Revolution*. A local consultant from the Grand Valley State University Johnson Center for Philanthropy was contracted to lead the process. The Association completed the pre-session worksheets to identify its current business model, funding sources, trends, strategy screen and big questions. Although great progress was made, the process did not move through the phases of strategy refinement and action planning. The board and management were committed to examine the needs of the community and how the organization should shape its future direction. To build on the previous work and complete a strategy roadmap, North Country Trail Association engaged Vista Global Consulting to support this process.

### VISION/MISSION/VALUES

Strategy must always begin with an understanding of an organization's core identity, seeking to leverage its unique strengths in effecting the change it seeks to make in the world. The NCTA vision, mission and values as presented below:

#### VISION

*Our vision for the North Country Scenic National Trail is that of the premier footpath of national significance, offering a superb experience for hikers and backpackers in a permanently protected corridor, traversing and interpreting the richly diverse environmental, cultural, and historic features of the northern United States.*

#### MISSION

*The mission of North Country Trail Association is to develop, maintain, protect and promote the North Country Scenic Trail as the premier hiking path across the northern tier of the United States through a trail-wide coalition of volunteers and partners.*

#### CORE VALUES

- Volunteerism
- Making a legacy contribution for the greater good to something larger than ourselves
- Stewardship
- Mutual respect, cooperation and partnership
- The importance of exercise, recreation and health
- Boot-strapping; a can-do attitude of 'git 'er done, and 'just do it!'

## COMPETITIVE ADVANTAGE

After comparing itself with its competitors, NCTA articulated its competitive advantages as follows:

- Longest national scenic trail in the United States
- Diverse trail (environmentally diverse and rich in cultural and natural history) allowing four-season access and opportunity for use
- Strong volunteer loyalty with dedication to service and chapter and affiliate network that strengthens the volunteer base
- National cachet through its partnership with National Park Service and by the designation of the NCNST as a national scenic trail

## STRATEGY SCREEN

Through the process, NCTA developed a strategy screen – a tool for making ongoing strategic decisions for the organization. Criteria will depend on the organization's mission, identity and current market position. The current screen includes the following criteria:

1. **Mission:** To what extent does this strategy achieve our mission? Does it align with our vision and values?
2. To what extent does it leverage and/or support our Competitive Advantages?
3. **Money:** Does it provide enough value for the money? Does it pay for itself or generate revenue? What is the financial risk? Is it a reasonable risk?
4. How well does it respond to trends?
5. **Capacity:** Do we have the capacity to do it? Is this the best use of staff and volunteer time? Can current staff handle this? Do we have the in-house expertise?
6. What are the trade-offs if we pursue this opportunity?
7. Are we the best to deliver or should we partner?
8. **Enhanced Perception:** Does it maintain or increase the standing and public perception of NCTA and the trail? Does it enhance the image and promote visibility of the trail and NCTA?
9. To what extent does it enhance the scenic aspect of the trail and the environment?
10. To what extent does it increase participation and volunteers?
11. How well does it align with the NPS agenda?

## STRATEGY DEVELOPMENT

The Real-Time Strategic Planning methodology identifies three levels of strategy must consider and plan for: 1) organizational, 2) programmatic and 3) operational. Organizational strategy comes first – it helps the organization clarify its core identity and articulate the change that it seeks to make in the world. With this capstone in place to set the organization's direction, NCTA can create strategies to ensure that its programs and resources are aligned to support its defining goals.

**Strategy 1:** Increase awareness of the NCNST and raise visibility of NCTA's work.

**Strategy 2:** Develop a larger and more diverse following and increase membership.

**Strategy 3:** Assure the sustainability of NCTA.

**Strategy 4:** Build, maintain and protect the NCNST.

**Strategy 5:** Build capacity of NCTA board of directors and align governance structure.

Questions for future consideration for strategy development are included in Appendix B.

## FINAL APPROVAL

The North Country Trail Association Board of Directors approved the new strategies and 2015-2017 Action and Implementation Plans in August 2014.

## REPORT FRAMEWORK

The following report details the strategy development process and the strategies that NCTA has identified to advance its work.

- The process and methodology of the strategic planning effort confirmed the vision, mission and values (pages 6-8).
- The current business model, environmental and competitor analysis (pages 9-13) provided the basis for NCTA's competitive advantages (page 14).
- The organizational, programmatic and operational strategies are described on pages 17-18.

## INTRODUCTION

The North Country Trail Association, founded in 1981 as the primary partner of the National Park Service (NPS) which administers the North Country Scenic Trail. The NCTA with an annual budget approximately \$800,000 and nine employees, consists of approximately 3,000 members, 25 chapters and 13 affiliated organizations. In April 2013, North Country Trail Association (NCTA or Association) embarked on a strategic planning process using the Real-Time Strategic Planning (RTSP) model developed by La Piana Consulting, published in the book, *The Nonprofit Strategy Revolution*. A local consultant from the Grand Valley State University Johnson Center for Philanthropy was contracted to lead the process. The Association completed the pre-session worksheets to identify its current business model, funding sources, trends, strategy screen and big questions. Although great progress was made, the process did not move through the phases of strategy refinement and action planning. The board and management were committed to examine the needs of the community and how the organization should shape its future direction. To build on the previous work and complete a strategy roadmap, North Country Trail Association engaged Vista Global Consulting to support this process.

The process launched in November 2013. Over the next eight months, the organization engaged staff, board members and Association constituents to create an integrated vision, mission and values and to craft the direction for the organization through 2017.

## PROCESS AND METHODOLOGY

### PROCESS

NCTA engaged in a strategic planning process with the assistance of Vista Global Consulting to develop strategies to advance the organization's mission. This planning process used a variety of methods to capture a deep understanding of NCTA and its work as a basis for moving the organization forward to achieve greater impact. The process began with initial interviews to understand current operations, organizational culture and thoughts on future direction. An initial Strategic Planning Work Group (SPWG) was established consisting of staff and board members. The board of directors and senior staff met for an 8-hour strategy development meeting over two days. Following this strategy development meeting, the SPWG met three times to refine the vision, values, competitive advantages and strategic options. This draft strategy document was shared with four external stakeholders and the board of directors for feedback. Following this feedback, the SPWG held three additional meetings to refine the strategies to action and implementation planning. NCTA then conducted two webinars with chapters and affiliates to solicit input and feedback on the strategic priorities. The SPWG reviewed the feedback from the webinars and refined the action plan. The updated plan was shared with the board of directors in July 2014. The final strategy roadmap, action plan and Gantt charts were approved by the board on August 22, 2014.

### INITIAL INTERVIEWS

In order to gain a deeper understanding of North Country Trail Association current operations and organizational culture, the consultant conducted four confidential interviews (three board members and one staff member) between November 22-November 26, 2013.

Key findings included:

- NCTA does not have a unified vision of the impact it wants to make as an organization.
- NCTA has low visibility compared to its competitor national scenic trails.
  - NCTA's board is in transition from an operational hands-on board to a more strategic

governing board.

- NCTA's federated structure of chapters is a strength and a challenge.

## STRATEGY SESSION

A strategy session was held with the NCTA Board of Directors and Senior Staff on December 6-7, 2013. During this meeting, the group reviewed and refined the work completed in April 2013 including examination of NCTA's current business model; the market and competitors; clarified the organization's competitive advantages; refined a strategy screen; prioritized the biggest questions facing the organization and drafted strategic options to respond to the big questions.

The notes from the December 6-7, 2013 strategy session are included as Appendix C. The comparative analysis of several competitors is included as Appendix D.

## EXTERNAL STAKEHOLDER TESTING

Following the strategy session, a Strategic Planning Work Group (SPWG) refined the core concepts to produce a draft strategy document. This strategy document was shared with five external stakeholders to obtain an external perspective on NCTA's vision, mission, values, and competitive advantages to inform strategy development. Interviews were conducted from January 21-February 7, 2014. Key findings included:

- The characteristics that contribute to NCTA success are the strength and dedication of its volunteer base and the chapter and affiliate network that extends the volunteer base.
- There was great interest in the Association focusing on new approaches to fundraising particularly building board capacity and increasing corporate support.
- There was interest in a new approach to trail building and maintenance that was more strategic and less opportunistic, taking into consideration key elements such as population density, access, land trust partnerships, tourist bureau partnerships, etc.

The External Stakeholder Summary is included as Appendix E.

## STRATEGY REFINEMENT AND ACTION PLAN DEVELOPMENT

Following the external stakeholder input, the staff on the SPWG took the lead to translate the strategy to action, creating action plans with outcomes, responsible parties and timelines. The timelines were reviewed by the SPWG and refined to create an achievable implementation plan for 2015-2017. In May and June 2014, two webinars were conducted to gather input and feedback from Chapter and Affiliate leaders; a total of 45 participants attended the webinars.

The Indexed Webinar Notes are included as Appendix F.

The Action Plan and Implementation Plan Gantt chart are complementary documents to this Strategy Roadmap.

## STRATEGY DEVELOPMENT

### VISION, MISSION AND VALUES

Strategy must always begin with an understanding of the organization's core identity, seeking to leverage its core strengths and competitive advantage in effecting change it seeks to make in the world. Organizational decisions and actions should align with your vision, mission and values. An effective vision keeps the organization moving by describing the organization's desired future. A well-crafted mission statement helps an organization stay focused by clearly stating what "business" the organization is in. The North Country Trail Association (NCTA) revisited and refined its vision, mission and values in this strategic planning process.

#### VISION

*North Country Trail Association envisions the North Country National Scenic Trail is that of the premier footpath of national significance, offering a superb experience for hikers and backpackers in a permanently protected corridor, traversing and interpreting the richly diverse environmental, cultural and historic features of the northern United States.*

#### MISSION

*The mission of North Country Trail Association is to develop, maintain, protect and promote the North Country Scenic Trail as the premier hiking path across the northern tier of the United States through a trail-wide coalition of volunteers and partners.*

#### CORE VALUES

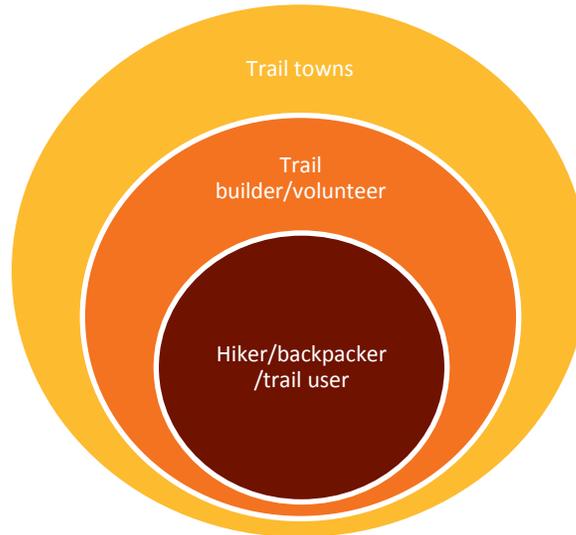
Core values are the broad belief statements that shape the criteria by which the board, staff and volunteers can judge whether or not the stated vision, mission, plans, and outcomes are right for the organization. They are the organization's basic building blocks and the foundation of the leadership's strategic thinking.

- Volunteerism
- Making a legacy contribution for the greater good to something larger than ourselves
- Stewardship
- Mutual respect, cooperation and partnership
- The importance of exercise, recreation and health
- Boot-strapping; a can-do attitude of "git'er done, and 'just do it!"

## CURRENT BUSINESS MODEL

In order to develop effective strategies it is important to clarify the current business model. NCTA reviewed and confirmed its current constituents/geographic area served, programs offered and funding sources.

## CONSTITUENTS/CUSTOMERS



### Centric Circle Exercise

Primary: **Hiker/Backpacker/trail user (11)**; Members (3); Chapters (1); American people in their park system (1); Outdoor enthusiasts (1); Children (1); Cities along the trail (1); Outdoor stores (1)

Secondary: **Trail builders/volunteers (4)**; Trail users (3); Land owners (3); Members (2); NPS (1); Chapter leadership (1); People who think trails are important (1); Families/communities near the trail (1); School groups (1); Hunters (1); Recreation facilities (1)

Tertiary: **Trail towns (4)**; Trail builders/volunteers (2); NPS/Partners (2); Government entities (2); Chapters (2); Future hikers (2); Future member (1); Long-distance hikers (1); YMCA (1); Corporate donors (1); Private landowners (1)

**Other customers:** Members (6), Chapters (4), Land owners (4); NPS/Partners/Government entities (4)

## GEOGRAPHY

NCTA serves the eight state region of ND, MN, WI, MI, OH, PA, NY, VT plus nearby DMA's – Chicago, Indianapolis.

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## FINANCES

Following is representation of financial position of NCTA. Table 1 details the sources of funding during fiscal year 2012, 2013, 2014 budget. Table 2 represents the Matrix Map tool for examining the business and programmatic components of the organization, analyzing each component in terms of its external impact on the community and its internal impact on the organization's finances.

**TABLE 1: REVENUE**

Source of Revenue (Income)	Percent of total budget, 2012	Percent of total budget, 2013	Percent of total budget, 2014	Comments (if applicable) such as regarding changes in funding from 2012 to 2013	Comments regarding 2014 funding sources in 2014, new funding anticipated, funding at risk
Foundation grants	9%	9.7%	16.1%	Trying to develop consistency, which is finally starting to happen. Nice bump last year in private foundations which we would like to see repeat again.	Should be able we can sustain the level of foundation giving but don't anticipate much growth at this point.
Corporate funds	%	%	2.5%		Not optimistic to see growth in this area unless new personal relationships between NCTA leadership and corporate leadership emerge
Government funding	51.5%	41.7%	41.5%	Seeing the drop in % dependence on govt funding which is part of our strategic development plan	Expect to see a flattening of the % decline experienced in last two years.
Unrestricted funding (such as endowment, priv. donations, auction)	16.3%	18.8%	16.6%	Seeing the reciprocal % increase in unrestricted private funding	Not sure we can maintain the % growth we've seen in last two years.
Earned income (including program fees, store, events)	6.0%	6.8%	6%		
Membership Fees	12%	15.4%	15.5%		
Other	5.2%	7.6%	1.8%		
<b>Total revenue</b>	\$945.0	\$800.9	\$816.0		<b>Projected revenue: \$816.0</b>
<b>Total expenses</b>	\$966.3	\$800.9	\$816.0		<b>Projected expenses: \$816.0</b>
<b>Surplus/(Deficit)</b>	\$-21.3	\$0.0	\$0.0		



## TRENDS

In addition to examining the business model, an examination of the market – the trends and competitors – is an important step in clarifying what competitive advantages NCTA possess. These competitive advantages are key components to any strategy development process.

TYPE OF TRENDS	DIRECTION OF TREND	COMMENTS
<b>Social needs/ demands for your programs/services</b>	Needs/demands are <input checked="" type="checkbox"/> Increasing <input type="checkbox"/> Decreasing <input type="checkbox"/> Staying about the same	<p>Social trends in areas such as anti-obesity, getting kids and families outdoors, seeking low-cost family recreational opportunities, combatting nature-deficit disorder – and national programs such as America’s Great Outdoors all contribute to a growing need for access to a world-class, low-threshold hiking experience, right nearby.</p> <p>Increased competition for varied and sometimes competing recreational uses of the same trail, increased pressures for development or other non-recreational uses.</p>
<b>Economic trends</b>	Economic indicators in the geographic area we serve are <input checked="" type="checkbox"/> Improving <input type="checkbox"/> Declining <input type="checkbox"/> Staying about the same	<p>National economy. The states that we go through (regional economy), things have improved a lot in ND. The boom of oil has established a fund that we can tap for grants. It is inconsistent across the region. Some areas improving faster than others. The areas that the trail goes through are fairly economically depressed.</p>
<b>Demographic trends</b>	The population we serve is <input checked="" type="checkbox"/> Increasing <input checked="" type="checkbox"/> Declining <input type="checkbox"/> Staying about the same	<p>Population growth is inconsistent. ND increasing, MI decreasing. Interest in wellness is increasing throughout the region. Youth are growing up with less connection to outdoors. Current membership: 50-75 yrs old. Greater ethnic diversity across total population, need to respond to this shift. Volunteers are primarily retired. Will the next generation of retiring individuals have the same amount of time and money?</p>

TYPE OF TRENDS	DIRECTION OF TREND	COMMENTS
<b>Available funding for your programs/services</b>	Funding is <input type="checkbox"/> Increasing <input checked="" type="checkbox"/> Decreasing <input type="checkbox"/> Staying about the same	<p>Federal funding is decreasing and likely will continue so, although opportunities exist for greater federal support of easement acquisition if LWCF grows.</p> <p>Corporate funding is a virtual non-starter until NCTA is larger/has more membership/better relationships.</p> <p>Private funding, while clearly growing/diversifying, will be hard-pressed to even make up the federal shortfall.</p>
<b>Political or policy trends</b>	The current political/policy environment is <input checked="" type="checkbox"/> Favorable (Some local/states) <input checked="" type="checkbox"/> Unfavorable (FEDERAL) <input type="checkbox"/> Staying about the same	<p>Congressional climate unfavorable in the immediate environment, congressional spending is reduced. The political power isn't very supportive of national park system. Local politics may be getting more favorable (trail town program) local economic argument. Federal Administrative (executive) initiatives on anti-obesity; get active could be favorable if the congressional climate was more favorable. Some states are more favorable (ND) for conservation.</p>
<b>Technology/ Social Media</b>	<input checked="" type="checkbox"/> effects on programming <input checked="" type="checkbox"/> effects on volunteers <input checked="" type="checkbox"/> effects on fundraising	<p>We have made strides in social media to grow awareness and membership. GREAT POTENTIAL. Yahoo groups, meet-up groups allow local groups to post hikes with little notice. Fundraising: Social Media strong potential for growth with younger population. It could be best methodology for "followers" v. "joiners". Map-making GIS technology will allow us to be more effective, real-time mapping support. It could also be a marketing device as well, "Every Trail" example.</p>
<b>Other trends impacting your organization</b>		<p>Inability to sustain marketing efforts, which will grow awareness, will hamstring ability to grow funding or membership.</p> <p>Infrastructure investment (staffing cost) is an increasing % of budget.</p>

## COMPETITION AND COMPETITIVE ADVANTAGE

As NCTA considered its strategic options, it considered competitive and collaborative opportunities. Although NCTA holds a somewhat unique niche, it faces a number of competitors engaged in related work. Among these are organizations with whom it also collaborates. NCTA examined the following organizations (International Mountain Biking Association; American Hiking Society; Pacific Crest Trail Association and Appalachian Trail Conservancy) to determine its competitive advantages. See Appendix D for Comparative Analysis of competitors.

After comparing itself with its competitors, NCTA articulated its competitive advantages as follows:

- Longest national scenic trail in the United States
- Diverse trail (environmentally diverse and rich in cultural and natural history) allowing four-season access and opportunity for use
- Strong volunteer loyalty with dedication to service and chapter and affiliate network that strengthens the volunteer base
- National cachet through its partnership with National Park Service and by the designation of the NCNST as a national scenic trail

## IDENTITY STATEMENT

Through the organization’s articulation of its desired impact, analysis of its current business model, assessment of key external trends and its competitive advantage in the marketplace, NCTA created the following identity statement:

<b>Mission</b>	The mission of North Country Trail Association is to develop, maintain, protect and promote the North Country National Scenic Trail as the premier hiking path across the northern tier of the United States through a trail-wide coalition of volunteers and partners.
<b>Vision/Impact</b>	Our vision for the North Country National Scenic Trail is that of the premier footpath of national significance, offering a superb experience for hikers and backpackers in a permanently protected corridor, traversing and interpreting the richly diverse environmental, cultural and historic features of the northern United States.
<b>Whom we serve</b>	Hiker/backpacker/trail user; Trail builders/volunteers; Trail towns; Members; Chapters; Land owners; NPS/Partners/Government entities
<b>Where we work</b>	Eight state region of ND, MN, WI, MI, OH, PA, NY, VT plus nearby DMA’s – Chicago, Indianapolis
<b>How we do this</b>	Trail building, trail maintenance, trail protection, chapter services, membership services, advocacy, marketing/outreach, development, volunteer management
<b>Our Unique Assets</b>	<ul style="list-style-type: none"> <li>▪ Longest national scenic trail in the United States</li> <li>▪ Diverse trail (environmentally diverse and rich in cultural and natural history) allowing four-season access and opportunity for use</li> <li>▪ Strong volunteer loyalty with dedication to service and chapter and affiliate network that strengthens the volunteer base</li> <li>▪ National cachet through its partnership with National Park Service and by the designation of the NCNST as a national scenic trail</li> </ul>
<b>How we are funded</b>	National Park Service 44%; Grants 17%; Donations 16%; Membership dues 12%; Other income 6%; Programs & events 3%; Trailshop 2%

## STRATEGY SCREEN

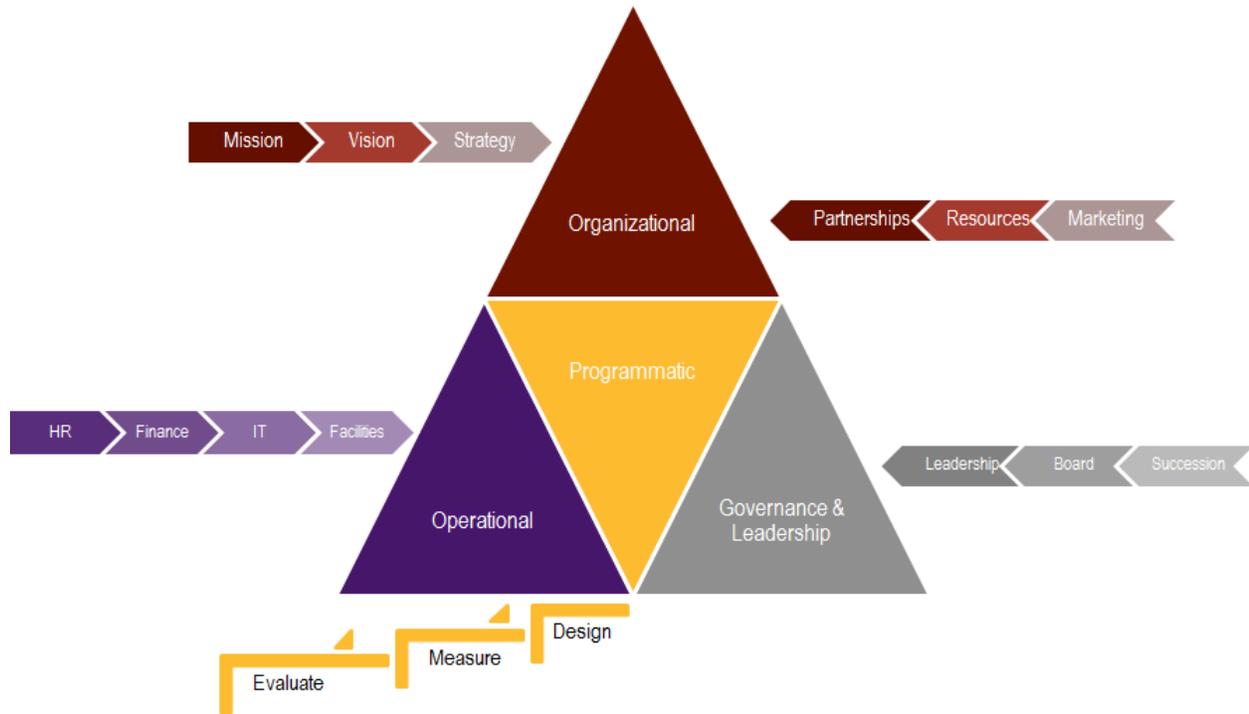
Before implementing a new strategy, we will evaluate the impact of the strategy using specific decision-making criteria. Criteria will depend on our organization's mission, identity and current market position. The criteria will evolve over time and usually contain 5-8 elements. It should always include criteria of being consistent with our mission and reinforce our competitive advantages. It makes decision-making explicit.

IN MAKING THIS STRATEGIC DECISION...	
✓	<i>... to what extent does it achieve our mission, align with our vision and values?</i>
✓	<i>...how well does it leverage and/or support our competitive advantages?</i>
✓	<i>...what is the level of return on investment? Does it pay for itself or generate revenue? What is the financial risk?</i>
✓	<i>...how well does it respond to trends?</i>
✓	<i>...to what extent do we have the capacity (staff/space/resources/time/volunteers) to accommodate the opportunity? Do we have the in-house expertise?</i>
✓	<i>...what are the trade-offs for pursuing?</i>
✓	<i>...are we the best organization to deliver this service or should we partner?</i>
✓	<i>...to what extent does it maintain or increase the public standing of NCTA and the trail? Enhance the image and promote visibility of the trail and NCTA?</i>
✓	<i>...to what extent does it enhance the scenic aspects of the trail and the environment?</i>
✓	<i>...to what extent does it increase participation and volunteers?</i>
✓	<i>...how well does it align with the NPS agenda?</i>

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## STRATEGIES

There are three levels of strategy that organizations must consider and plan for: 1) organizational, 2) programmatic, and 3) operational (see Strategy Pyramid diagram, below). In order to build a sound overall strategy, organizations must work from the top down. Organizational strategy comes first – it helps the organization clarify its core identity and articulate the change that it seeks to make in the world. With this capstone in place to set the organization’s direction, it can then create strategies to ensure that its programs and resources are aligned to support its defining goals. Strong governance, or board functioning and leadership, are foundational for moving all of these key strategies forward in a cohesive way.



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## BIG QUESTIONS

In the April 2013 and the December 2013 sessions, participants identified big questions facing the Association at the current time. After a process of voting the four big questions given the highest priority were the following:

1. HOW DO WE BECOME BETTER KNOWN?
2. HOW DO WE GENERATE SUSTAINABLE REVENUE?
3. HOW DO WE ATTRACT A MORE DIVERSE FOLLOWING?
4. HOW DO WE ATTRACT A MORE DIVERSE MEMBERSHIP (AGES 20-50)?

During the December session, small groups drafted strategic options to answer these four big questions. The SPWG refined the strategic options to final strategies for the strategy road map for the timeframe of 2015-2017. The final strategies are the following:

## ORGANIZATIONAL STRATEGY

### STRATEGY 1: INCREASE AWARENESS OF THE NCNST AND RAISE VISIBILITY OF NCTA'S WORK.

- Hire a Marketing staff person
- Implement the key elements of the 2013 marketing strategy
- Raise individuals' consciousness of the entire trail by increasing visibility
- Maintain adequate marketing and communications administrative support and monitor marketing messaging and website/social media
- Increase Chapter/affiliate engagement

### STRATEGY 2: DEVELOP A LARGER AND MORE DIVERSE FOLLOWING AND INCREASE MEMBERSHIP.

- Expand activities that target audiences under age 50 (Generation X, Millennials)
- Promote membership campaigns
- Develop chapter/volunteer/member capacity building activities in recruitment and retention

### STRATEGY 3: ASSURE THE SUSTAINABILITY OF NCTA.

- Continue the annual donor solicitation and utilize social media to generate new donors
- Promote long-term revenue streams
- Cultivate and solicit major donors and family foundations
- Identify and generate corporate relationships that yield major sponsorships
- Maintain a strong partnership with the National Park Service
- Enhance the fundraising culture and activities of the board of directors and chapters
- Hire a Development Associate
- Consider implementation of a capital campaign to fund increased annual expenses

## PROGRAMMATIC STRATEGY

### STRATEGY 4: BUILD, MAINTAIN AND PROTECT THE NCNST.

- Develop a strategic approach to trail building and maintenance
- Strengthen training and capacity building of volunteers: trail building, trail maintenance, safety, and trail protection (easements, working with land owners, public and private)
- Establish and foster partnerships with other organizations (state, local agencies, land trusts) to strengthen and complement NCTA efforts
- Improve and support existing relationships with state and federal agencies for the management of the trail (eg. MOUs, communication)
- Increase organizational capacity to monitor state and federal policy that can impact the trail

## GOVERNANCE/LEADERSHIP STRATEGY

### STRATEGY 5: BUILD CAPACITY OF NCTA BOARD OF DIRECTORS AND ALIGN GOVERNANCE STRUCTURE.

- Create strategic dashboard to monitor strategic plan
- Review, refine and establish board committee structures and responsibilities
- Establish annual BoD performance goals
- Establish annual BoD self-evaluation process

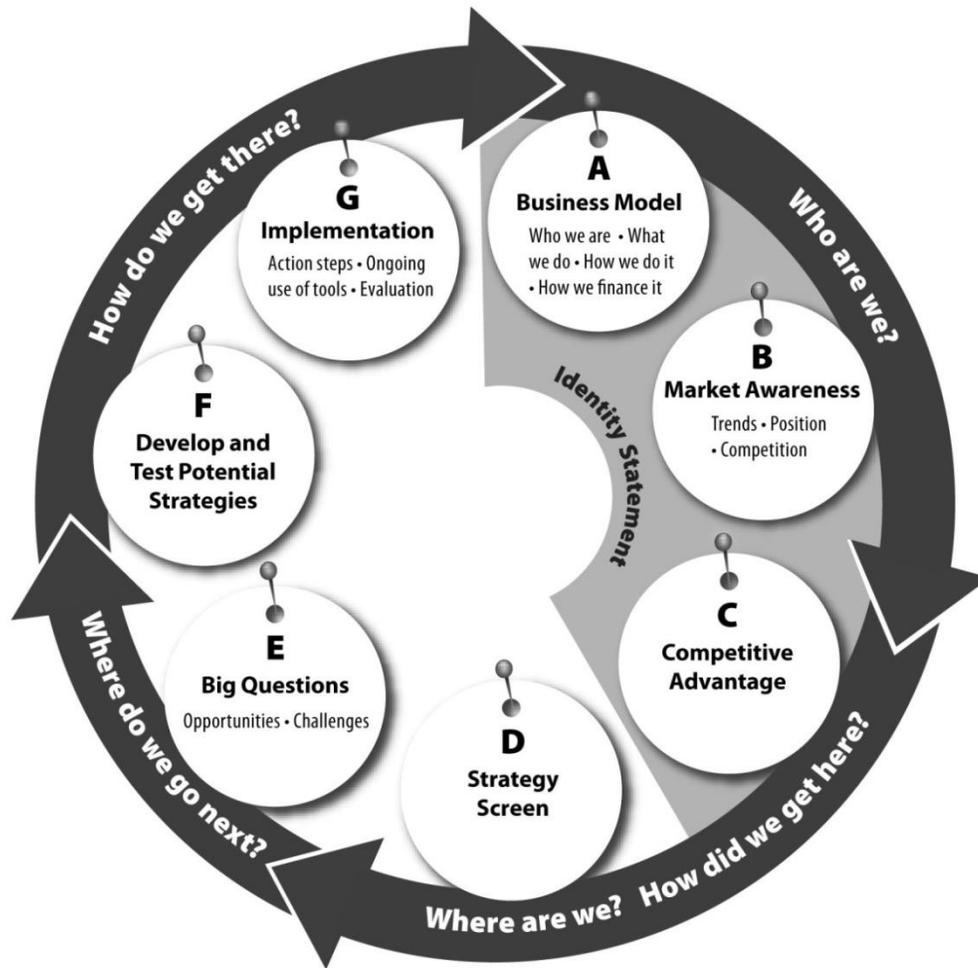
## IMPLEMENTATION

The implementation plans for each strategy were developed through a work group process involving board members and staff. The Action Plan and Implementation Plan Gantt chart are separate documents that complement this roadmap.

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## SCANNING, REVIEWING, REVISING

In the *Real-Time Strategic Planning* approach, strategy formation is a continuous cycle that contrasts with the episodic three-year cycle used in traditional strategic planning. The nature and timing of strategy development efforts is unique to each organization and its situation. However, the process steps in the ongoing cycle are fairly predictable, tying organizational, programmatic and operational strategies into a cohesive package.



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In the dynamic landscape of shrinking government funding and changing demographics, it is critical that NCTA continues to pay close attention to the competitive situation in the market to understand how it can best advance its strategies. This strategy development process flows naturally and should be examined periodically when any part of the current understanding becomes dated or appears out of alignment with the current or anticipated future direction.

## APPENDIX A: ACTION PLAN AND IMPLEMENTATION PLAN

The Action Plan and Implementation Plan Gantt chart are complementary documents to this Strategy Roadmap.

## APPENDIX B: QUESTIONS FOR FUTURE CONSIDERATION

The items below were raised during the process as potential big questions for future consideration. These questions are important, and could surface in the future, requiring attention of NCTA.

### FINANCE, STAFFING AND STRUCTURE

- How do we balance allegiance and reliance upon the grassroots with the need to create national-level strategic organization?

### PROGRAMS

- What is our shared vision of the trail? What does finishing the trail mean?

## APPENDIX C: DECEMBER 6-7, 2013 SESSION NOTES

### DAY 1: DECEMBER 6, 2013

#### CHECK IN AND AGREEMENTS

##### What do you need to fully participate today?

- Honesty
- Respect
- Constructive
- Not hide feelings
- Focus
- Vision toward a living document
- Forthright
- Open to off center ideas
- Open mindedness
- Be pragmatic and realistic in conclusions
- Listen, cooperate
- Considerate of all ideas
- Stay on task, not talk about self
- Fun!
- Creative ideas, no idea is stupid
- Commit to time together

#### VISIONING EXERCISE: HEADLINES

- North Country NST Makes it a Grand Slam (PCT, ACT, CDT, NCT)
- Completion and protecton of the NCNCST ensures status of premier hiking trail
- Today's Millenials Experience it All... Celebrating the Completion of the Most Famous Trail of All
- NCNST is completed, premanently protected, used and treasured by communities for generations
- NCNST Cures All
- Nature Deficit Disorder eradicated as record number of families and youth experience the NCNST
- Obesity is down 80%
- Environmental awareness is increased
- Economies boom in trail towns as families and tourists visit
- Long Distance Hiking Declared "cure-all" for America's Problems
- Surgeon General prescribes Hike the North Country Trail for your Health
- Millions Gather to Celebrate America's Premier Hiking Treasure

- President Cuts Ribbon on Final Backcountry Mile on the North Country Trail

## Themes

- Completion
- Protected
- Use
- Youth
- Prominence/recognition
- Treasured/emotional value, community trail family

## CURRENT BUSINESS MODEL

### Customers

#### Centric Circle Exercise

- Primary: **Hiker/Backpacker/trail user (11)**; Members (3); Chapters (1); American people in their park system (1); Outdoor enthusiasts (1); Children (1); Cities along the trail (1); Outdoor stores (1)
  - Secondary: **Trail builders/volunteers (4)**; Trail users (3); Land owners (3); Members (2); NPS (1); Chapter leadership (1); People who think trails are important (1); Families/communities near the trail (1); School groups (1); Hunters (1); Recreation facilities (1)
  - Tertiary: **Trail towns (4)**; Trail builders/volunteers (2); NPS/Partners (2); Government entities (2); Chapters (2); Future hikers (2); Future member (1); Long-distance hikers (1); YMCA (1); Corporate donors (1); Private landowners (1)
  - **Other customers:** Members (6), Chapters (4), Land owners (4); NPS/Partners/Government entities (4)
- First time thought about NCTA customers
  - Members seen in primary a surprise
  - Surprised NPS was customer
  - Thinking about customers for indirect services v. programs
  - Customers for internal marketing v. external marketing

## CLOSING

What is one thing that is important this process does for NCTA?

- Changes for the board to be effective (3x)
- Get on same wavelength (2x)
- NCTA be more effective
- Make cost-effective decisions
- Stability
- New ideas, kick start (2x)
- Clear target for NCTA

- Tools for decision making
- Flexible living document
- Strengthen marketing position
- Focus on the most promising target (achievable goals)
- Focus on strategies that integrate our work
- Insights to break through knotty problems
- Discipline and integrity
- We know how to be a strategic governance board

## DAY 2: DECEMBER 7, 2013

### CURRENT BUSINESS MODEL

#### Geography

- Where we deliver programs is not the same geography as donor geography

#### Funding

- The change in the total budget of 2014 (\$945K to \$816K) is due to not including NPS allocation that is restricted and total is not determined at start of year

#### Matrix Map

- Trail towns and training were not included
- May want to do this on an annual basis
- How do we measure the effectiveness of each item?

### MARKET AWARENESS/COMPETITIVE ADVANTAGE

#### Trends

- Needs/Demand: There is a national campaign to get outdoors/wellness but at local level there is less interest of young going outside
- Political/Economic: Anti-obesity campaign is a plus at national level. Trail towns are connecting to economic development which is a positive

#### Competitors (IMBA, AHS, PCT, ATC)

- NCTA has small staff
- IMBA has high corporate support
- Low government investment for NCTA
- NCTA is young organization compared to other Scenic Trail Associations- "Late to Party"
- Long footprint/geography with small staff
- Strong social media use by competitors
- Should we consider AHS as a partner?

- Should we consider more events on the trail for visibility? (ultras, trail running groups)
- Does our name and location hurt us? AHS has strong name/location. Merger?
- NPS previously had unfavorable position to ultras
- Partnerships w/local running clubs
- Mindful of landowners interests and races
- These types of events are a change in attitude on trail use (bikes? Horses?)

### Competitive Advantage

- Longest trail
- Diverse trail (cultural and natural history)
- Strong volunteer loyalty and service
- National cachet (part of something bigger, NPS partnership)

## STRATEGY SCREEN

### *To what extent.... (High, Medium, Low)*

1. **Mission:** To what extent does this strategy achieve our mission? Does it align with our vision and values?
2. To what extent does it leverage and/or support our Competitive Advantages?
3. **Money:** Does it provide enough value for the money? Does it pay for itself or generate revenue? What is the financial risk? Is it a reasonable risk?
4. How well does it respond to trends?
5. **Capacity:** Do we have the capacity to do it? Is this the best use of staff and volunteer time? Can current staff handle this? Do we have the in-house expertise?
6. What are the trade-offs if we pursue this opportunity?
7. Are we the best to deliver or should we partner?
8. **Enhanced Perception:** Does it maintain or increase the standing and public perception of NCTA and the trail? Does it enhance the image and promote visibility of the trail and NCTA?
9. To what extent does it enhance the scenic aspect of the trail and the environment?
10. To what extent does it increase participation and volunteers?
11. How well does it align with the NPS agenda?

## BIG QUESTIONS (ALL)

1. How do we attract a more diverse membership? (5)
2. What is our shared vision of the trail? What does finishing the trail mean? (1)
3. How do we balance allegiance and reliance upon the grassroots with the need to create national-level strategic organization? (3)

### **Revenue Generation**

1. How do we generate sustainable revenue? (16)

### **Governance and Leadership**

1. What is the best governance structure to support this organization? **POST-STRATEGY DEVELOPMENT**

### **Marketing/Outreach**

1. How do we become better known? (17)
2. How do we attract a more diverse following? (12)

### **Refined Questions**

- How do we become better known? (17)
- How do we generate sustainable revenue? (16)
- How do we attract a more diverse following? (12)
- How do we attract a more diverse membership? (5)

## BIG QUESTION #1: HOW DO WE ATTRACT A MORE DIVERSE MEMBERSHIP? (TARGET POPULATION AGES 20-50)

### **Group 1: Gaylord, Debbie, Jim, Larry**

- Personal 1-on-1 recruitment
- Presentations at schools, colleges
- Social media
- On-demand members using Square and Paypal via cell phone
- Paid advertising
- Through hiking clubs
- Appeal to community organizations

### **Priorities**

- Social media

- Presentations at schools and colleges
- Hiking Clubs/community organizations (tied)

**Next Steps:**

- 

## **BIG QUESTION #2: HOW DO WE GENERATE SUSTAINABLE REVENUE?**

### **Group 2: Brian, Joyce, Lorana, Andrea, John**

- Increase Corporate Funding
- Approach oil, gas & mining companies
- Timber industry (Plum Creek)
- Health Insurance companies
- Appropriate to build field grants
- Grow Endowment
- Promote Legacy Society
- Identify large funders (corporations, foundations)
- Annual events that raise funds
- Hikes, challenges
- Traditional fundraisers

**Priorities**

- Annual Events
- Grow Endowment
- Corporate Funding

**Next Steps**

- 

## **BIG QUESTION #3: HOW DO WE ATTRACT A MORE DIVERSE FOLLOWING?**

### **Group 3: Bruce, Jerry, Mark, Lynda**

- Multiple coordinated events simultaneously along entire trail (diversity focus)
- Local chapters work w/local schools/curriculum to get kids out on a hike on the trail (high schools)
- Chapters on College campuses/utilization of Meet-Up Groups
- Outreach to already diverse groups (Scouts, NAACP, Latino)
- Strategies targeting Women (exercise programs)
- Piggyback on NPS Centennial Marketing

**Priorities**

- Events had highest priority
- College/Meetups

- Diverse Groups
- Kids/High Schools

#### **Next Steps**

- 

## **BIG QUESTION #4: HOW DO WE BECOME BETTER KNOWN?**

### **Group 3: Mary, Jaron, David, Doug, Tom**

- Get celebrity spokesperson
- Enhanced trail-wide signage and kiosks
- Coordinated trail-wide activity and collateral media hype
- Get a headline on the cover of Backpacker magazine
- Create media/social media buzz every year on key hiker
- Create partnerships that increase outreach (AHS, BSA, Schools)
- Write a book/story about walking the trail a la Strayed, Bryson

#### **Priorities**

- Get a headliner on the cover of Backpacker
- Create partnerships that increase outreach
- Get celebrity spokesperson

#### **Next Steps**

- 

## **STRATEGIC OPTIONS DISCUSSION/THEMES**

- Social media mentioned frequently
- Trail-wide events (across full trail)
- Connections between visibility-spokesperson-target group for membership
- Funding depends on visibility
- Schools as partners theme
- Everything is about outreach and marketing
- Get chapters to focus on marketing in the winter
- Emphasize trail-wide effort across the full trail not just local chapter geography
- Consider a marketing/outreach position in each chapter
- Shift chapter mindset to “One Trail” national success
- College internships to assist with marketing
- Combine marketing/membership role in chapters
- Volunteer councils? Are they a vehicle for marketing at state level?

## CLOSING THOUGHTS AND COMMENTS

### What was the best part of today? Questions still remaining?

- Good focus
- Wild ideas on visibility
- Similarities in groups 3x
- Strategy Screen 3x
- Degree of consensus on visibility
- Sustained high level of energy
- Advertising/promote trail locally
- Do we have capacity?
- Work in small groups was great
- Caution in moving forward making sure we have the right focus
- How will we implement?
- How to shift from publicity to marketing at chapter level
- We acted strategically
- Feels like we are coalescing to get things done
- I want us to think on the wild side not to continue with business as usual

## APPENDIX D: COMPARATIVE ANALYSIS

This information is for internal use only.

RESOURCE	COMPETITORS			HOW DOES YOUR ORGANIZATION COMPARE?
	International Mountain Biking Association	American Hiking Society	Pacific Crest Trail Association	
<b>Customers (such as number of customers, customer satisfaction, customer retention)</b>	35,000 members, 750 chapters, 200 corporate partners	Hikers and trail lovers. A few thousand Individual members (couldn't find exact number) 375 Organizational members (Hiking Alliance)	Thousands of segment and day hikers. Not sure how many hikers use the trail annually or how many members they have	NCTA has several levels of customers: Users, Members, Volunteers/Maintainers. More accessible to towns than PCT. Chapter-based structure is distinct to PCT. Appalachian Trail has 30 clubs but separate 501c3.
<b>Media attention/publicity</b>	Outstanding and aggressive media outreach	Great media attention at the national level because journalists look to AHS as the national voice for all hiking and trail issues.	FB Friends – 4,200 FB Likes – 14,000 “Strayed” book – Oprah show/Book of the month Muir Trail movie 561,438 Web visits (2012)	NCTA not strong in this area. Very new in this arena of guidebooks.
<b>Staff</b>	50 staff, including regional coordinators	7 full-time with 2 regular interns. ED, Directors of Membership, Development,	19 (has regional staff)	Comparable to AHS. We are understaffed for needs of organization (marketing,

<b>COMPETITORS</b>				
<b>RESOURCE</b>	<b>International Mountain Biking Association</b>	<b>American Hiking Society</b>	<b>Pacific Crest Trail Association</b>	
<b>RESOURCE</b>	<b>HOW DOES YOUR ORGANIZATION COMPARE?</b>			
		Govt. relations, 2 Program managers, and Finance and office management.		mapping, administration). There are NPS staff (2 FTEs) devoted to NCNST. Unclear how PCTA has Forest Service staff support. For major national scenic trails there is Federal staff support. NCTA has regional staff similar to PCTA and IMBA, however NCTA's regional staff only cover 3 states..
<b>Board</b>	High caliber BoD of company CEO's; lawyers, movers and shakers—national leaders in finance, conservation, marketing, entrepreneurship. Plus an honorary BoD.	13 members, strong skills, from other leading organizations.	14 (West coast company CEOs) similar to IMBA	NCTA has more grassroots board members, less name recognition board members. Must be NCTA member to be board member. We haven't built our board with a more external lens. PCTA board development targets, interviews and strategically recruits BoD members. NCTA doesn't have a deep pool of potential board members. NCTA bylaws require

<b>COMPETITORS</b>				
RESOURCE	International Mountain Biking Association	American Hiking Society	Pacific Crest Trail Association	HOW DOES YOUR ORGANIZATION COMPARE?
				geographic representation, which further limits candidate pool.
<b>Volunteers</b>	Highly motivated and enthusiastic. Diversity from trail building to advocacy to marketing.	Large remote volunteer base with the volunteer vacations program. Volunteers have to pay to volunteer through AHS registration fee and pay to travel to destinations.	1,637	Strong growth of volunteer participation of NCTA. NCTA is a highly decentralized chapter structure. IMBA mobilized around advocacy, younger demographic. AHS leverages volunteers all over the U.S. to do trail work and registration fee.
<b>Diversity of funding</b>	49% Clubs/Dealers 19% Individual 15% Royalties/Interest 11% Trail Consulting 4% In-kind 1% Corporate Budget: \$5.37m	37% Individuals 28% Corporate 16% Govt. Grants 17% Sales 2% Foundations Budget: \$1,114,000	50% - Private Funds (Incl. Corp/Fdn/ Membership/Store) 50% - Govt Funds  \$2.2M Annual budget	NCTA's sources are diverse, but percentages are less so.  We lack the business backing our competitors have. Our anonymity makes it hard to get major business to contribute to our cause..

<b>COMPETITORS</b>				
RESOURCE	International Mountain Biking Association	American Hiking Society	Pacific Crest Trail Association	HOW DOES YOUR ORGANIZATION COMPARE?
<b>Availability/amount/types of funding</b>	4-Star Charity Navigator rating	Able to attract large corporate support because they are nationally recognized and have a broad reach. They put a lot of effort into soliciting corporations to support the organization and for co-branding. (Nature Valley, Backpacker Magazine, Merrell). Not as much effort in grants that have specific deliverables.  Grant program funded by corporate.  Located in DC allows them to interact with large funders and federal partners on a regular basis.	Private donations, Corp donations, Foundation grants, Govt funds	NCTA is operating on the same landscape, but has the advantage of a steady (hopefully) source of Government base ops revenues, and disadvantage of low name recognition and smaller numbers that would appeal to corporate or even individual donors.  Our reliance on government funding puts us in jeopardy when the political climate shifts toward smaller government spending.
<b>Programs or services (type, quality, number of services provided)</b>	Trail Building School/Outreach/Consulting. Top caliber.  Aggressive policy advocacy and	Volunteer Vacations – remote volunteer program. Great program but needs better management. Success depends	Trail Protection Trail Building/Maint. Trail Promotion/Events	NCTA seems more limited in its capacity to deliver programs that the rest can.

COMPETITORS				
RESOURCE	International Mountain Biking Association	American Hiking Society	Pacific Crest Trail Association	HOW DOES YOUR ORGANIZATION COMPARE?
	<p>communications</p> <p>Communications Alerts</p> <p>Chapter &amp; Club Capacity Development</p> <p>Travel Destination planning/consulting</p> <p>Instructor certification</p> <p>Mapping</p> <p>Model Trails</p> <p>National Mountain Bike Patrol</p> <p>Public Lands Initiative</p> <p>Subaru Trail Care Crews</p> <p>Trail Planning &amp; Design Services</p>	<p>on the land management or local host (like NCTA) more than AHS management.</p> <p>National Trails Day – Very successful. Has grown to more than 2,000 events/year. Also relies on local host to do the work. AHS' branding gets lost in the local event messaging.</p> <p>Advocacy - Call themselves the National Voice for hikers. Not very coordinated. Don't always represent the issues well but always have a seat at the table due to their relationships and location in DC.</p> <p>Alliance – meant to be a partnership program but is really no more than a membership program.</p>	<p>Magazine/Newsletter</p> <p>Mapping Services/GIS</p> <p>Hiker Services</p>	<p>For our size, we have great capability to build trail because of the expertise of our volunteer base. We don't have the resources to provide a lot of training, or to supervise volunteer efforts.</p>

<b>COMPETITORS</b>				
<b>International Mountain Biking Association</b>		<b>American Hiking Society</b>		<b>Pacific Crest Trail Association</b>
<b>RESOURCE</b>				<b>HOW DOES YOUR ORGANIZATION COMPARE?</b>
		National Trails Fund – Grant program to alliances. Grants 26K/year. Funded by corporate funders.		
<b>Mission-Related Impact</b>	<p>High impact</p> <p>The International Mountain Bicycling Association (IMBA) is a 501 (c) 3 non-profit educational association. Our mission is to create, enhance and preserve great mountain biking experiences.</p> <p>Since 1988, IMBA has been bringing out the best in mountain biking by encouraging low-impact riding, volunteer trailwork participation,</p>	<p>Mission: As the national voice for America’s hikers, American Hiking Society promotes and protects foot trails, their surrounding natural areas, and the hiking experience.</p> <p>All of their programs are mission driven and do great work toward reaching their goals but all of their programs rely heavily on other organizations and partners to implement their programs.</p>	<p>Exclusive Mexico to Canada west coast mtn spine long distance trail. Known name and brand. Longer history as a trail. The John Muir connection. Strong USFS partnership. Mountain landscape</p>	<p>Compared to the others NCTA’s impact is more limited.</p> <p>Our lack of name recognition is hampering our ability to make our trail better known to the general public. It is hard to protect a resource if it doesn’t have broad public support.</p>

COMPETITORS				
International Mountain Biking Association		American Hiking Society		Pacific Crest Trail Association
RESOURCE				HOW DOES YOUR ORGANIZATION COMPARE?
	<p>cooperation among different trail user groups, grassroots advocacy and innovative trail management solutions. IMBA's staff, chapters, clubs and members work to benefit the entire mountain bike community.</p> <p>We create a powerful voice for trails, public land and policies that welcome bikes.</p> <p>We build sustainable trails and bike facilities to make mountain biking more accessible.</p> <p>We teach environmentally responsible trail building and trail etiquette practices.</p> <p>We inspire more people to experience the outdoors on bicycles.</p>			

COMPETITORS				
International Mountain Biking Association		American Hiking Society		Pacific Crest Trail Association
RESOURCE				HOW DOES YOUR ORGANIZATION COMPARE?
<b>General Comments</b>		Went from 4 star Charity Navigator rated to 2 star in the past few years.  Staff turnover is a problem.		

## APPENDIX E: EXTERNAL STAKEHOLDER INTERVIEW SUMMARY

To: NCTA Strategic Planning Work Group  
From: Mary Stelletello  
CC: NCTA Board of Directors  
Date: February 14, 2014  
Re: Summary of Interview Findings

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### INTRODUCTION

Vista Global Consulting conducted five interviews with external stakeholders. This memo provides a summary of the key themes that emerged from the feedback and topics for discussion in the strategy refinement process.

- Dave Cornell, NCTA Former Board President
- Bill Lynch, Lux Foundation
- Pat Monahan, President, Finger Lakes Trail Conference
- Mark Weaver, Superintendent, NOCO, National Park Service
- Gary Werner, Executive Director, Partnership for the National Trail System

### CONTRIBUTIONS TO SUCCESS

There was consistency among respondents regarding the characteristics that contribute to NCTA success. The “human capital” of the organization, volunteers were mentioned most frequently. The professional staff and local chapters were also highlighted.

*The biggest asset is the huge volunteer base that accomplishes so much through its efforts.*

*The dedication and the tenacity of the volunteer base that has a huge project and is a very small group.*

### DESIRED IMPACT/VISION

When asked what NCTA is doing in 5 years, there was a variety of comments that focused on the use, protection and visibility of the trail. There were other comments that focused on sustainability of the organization related to increased fundraising and collaboration, connecting the trail to local communities in more strategic ways.

*There is nothing like trail protection to improve the use of the trail.*

*Collaborating more with conservation organizations, land trusts and environmental organizations in the states the trail goes through....provide more outreach programs in the metropolitan areas that are near the trail to get more people using the trail. Provide more opportunities for shorter hikes while not losing sight of the long distance hiking.*

*Turn volunteers into donors. Target areas of the trail that will provide connectors so longer hikes can be completed without going off trail....it will promote trail use, trail awareness, a multiplier effect.*

*Connect with tourist bureaus so that visitors see the trail as an “attraction”.*

*More trail towns!*

***Our vision for the North Country National Scenic Trail is that of the premier footpath of national significance, offering a superb experience for hikers and backpackers in a permanently protected corridor, traversing and interpreting the richly diverse environmental, cultural and historic features of the northern United States.***

When asked to comment on the actual vision/impact statement, there were elements that gained universal agreement, “protected corridor” and “richly diverse environmental, cultural and historical features”. There were varying opinions and a critical response to the use of the word “footpath”. In addition, there was one comment that raised the question of including the term “walker” because many people may have no desire to do a long hike.

*This question of being a “footpath” has dogged us for years. It was put to bed for the Appalachian Trail through Congressional action but I don’t see that happening here.*

*I appreciate their desire for it to be a footpath but they can’t do that to the extent of excluding anyone.*

*Consider talking about walking v. hiking. It would be more inviting to those who don’t aspire to make long journeys.*

## **MISSION**

***The mission of North Country Trail Association is to develop, maintain, protect and promote the North Country Scenic Trail as the premier hiking path across the northern tier of the United States through a trail-wide coalition of volunteers and partners.***

In general there was strong support for the mission statement. The concern regarding the hiking path language was highlighted. Other comments highlighted the great importance of the “trail-wide coalition” as a key element to achieving the mission.

*The trail-wide coalition is hugely important..however they need to find a way to embrace this collaboration to multiply available resources.*

## **COMPETITIVE ADVANTAGES**

North Country Trail Association identifies its competitive advantages as the following:

- The NCNST is the longest national scenic trail in the United States
- The NCNST is environmentally diverse and has rich cultural and natural history. In addition, it allows 4-season access and opportunity for use.
- NCTA has a strong volunteer base with great loyalty and dedication to service. The chapter and affiliate network strengthens the volunteer base.
- NCTA has national prominence through its partnership with the National Park Service and by designation of the NCNST as national scenic trail.

There was general agreement that the volunteer base was a strength. However one respondent asked if “strong” meant the amount of volunteers because he didn’t believe there were enough volunteers. One respondent mentioned the chapter and affiliates as a unique attribute and suggested that none of the other trail associations had a significant chapter network. There were two comments related to the language regarding the partnership with the NPS. One respondent thought it was important, another thought it should be removed and a third respondent suggested that the U.S. Forest Service was equally important.

*Highlighting the natural, cultural history is really important and this is a growth area for them.*

*The diversity and richness of the trail is in part because of its remoteness but also because sections are accessible to large populations which makes it unique.*

*There isn’t the same hiking culture as the other National Scenic Trails, there is more of a “enjoy the countryside” culture and this trail can be used in the winter, they could leverage this as a 4-season opportunity.”*

## **STRATEGY 1**

### **Increase awareness of the NCNST and raise visibility of NCTA’s work by:**

- Continuing to implement key elements of 2013 marketing strategy in the areas of website enhancements; social media promotion and integration (Facebook, Instagram, Twitter, Pinterest); blog development and print publications.
- Raising individual’s consciousness of the entire trail by increasing its visibility through the trail town program; a one-day full trail event; trail signage, interpretation, kiosks and guides; chapter/member capacity building in event management and outreach; and uniform branding across all chapters.
- Increasing paid media and media relationships, sponsorships and partnerships with outdoor retail community, local governments and land trusts.
- Maintaining adequate marketing and communication administrative support and monitoring marketing messaging and the website/social media metrics.

There was clear consensus that marketing and visibility are very important and social media is where the younger generation will connect. However, given the role that the baby boomer population continues to play for NCTA, there is still a need for more traditional forms of media (print). Several respondents mentioned trail towns as a strategy to raise visibility of important sections of the trail. Partnerships with land trusts were highlighted not only to support trail protection but stewardship. There continues to be the question of whether through hikers or day hikers are the target for raising awareness.

*The problem is that this is like a 4600 soaker hose; there is no way to distinguish but trail towns can help distinguish sections.*

*Awareness and visibility don’t create use; social media needs to move people to use.*

*Consider tourist bureaus as partners, they can be a valuable asset for increasing visibility.*

## **STRATEGY 2:**

### **Develop a larger and more diverse following and increase membership by:**

- Continuing to implement key elements of the 2013 membership development strategy by increasing the frequency of engagement and shaping messaging to create a feeling/experience.
- Expanding activities that target audiences under age 50 (Generation X, Millennials).
- Promoting membership campaigns: e-members, year-end appeal, lapsed members and affiliates/partner organizations.’

- Developing chapter/volunteer/member capacity building activities in recruitment and retention.

This strategy raised some interesting insights from respondents. There was agreement that chapters are an essential component of the success of this strategy and should be involved in its development. One respondent suggested that NCTA should give away free memberships for a year to anyone that might have interest in the trail (landowners, scout troops, local businesses, etc.) which would raise the visibility of the trail and perhaps 50% would become members. One respondent thought that creating chapters on university campuses would be a good approach to reaching the younger audience.

*Reaching young folks is important but don't forget the "not yet fading" baby boomers... There should be a special message for them, "If you are retiring we have lots of ways for you to stay young on the NCNST"*

*If chapters are going to serve a greater role than just build trail... serving as liaisons with land owners, marketing, messaging, that doesn't just happen, that may require more interaction with central office.*

### **STRATEGY 3:**

#### **Assure sustainability of NCTA's work by:**

- Continuing the annual donor solicitation and utilize social media to generate new donors.
- Promoting long-term revenue streams such as planned giving and endowment building.
- Cultivating and soliciting major donors and family foundations, establishing a fundraising advisory committee.
- Identifying and generating corporate relationships that yield major sponsorships.
- Maintaining strong partnership with the National Park Service.
- Enhancing the fundraising culture and activities of the board and chapters.

All of the respondents believed that a new approach to fundraising is critical for NCTA moving forward. Several believed the starting point for this new approach is the board of directors. One suggestion was for the board to start recruiting outside the NCTA membership and chapter network to reach individuals who would have corporate, political and financial networks to bring to the organization. With respect to the partnership with the NPS, one respondent suggested the importance of the U.S. Forest Service and state level natural resource departments.

*We need people on our board with political and financial pull. We need a diverse board, people of color, non-hikers, and environmental activists. If we had one board member from ATC or PCT we would be an entirely different organization.*

*It isn't just about fundraising, it is also about chapter health, and chapter development. Someone who is willing to adopt a piece of the trail is a prime candidate for fundraising. Corporate sponsorship would have a lot of potential because the trail is non-controversial.*

*If we get a few people from corporation foundations on the trail, then there is a connection and we could reach out to those foundations.*

### **STRATEGY 4:**

#### **Build, maintain and protect the NCNST (North Country National Scenic Trail) by:**

- Strengthening training and capacity building of volunteers: trail building, trail maintaining, safety and trail protection (easements, working with land owners).
- Develop strategies to build and maintain trail in areas where there are no chapters or volunteers (eg. new chapter and affiliate development, volunteer/paid work crews).

- Establishing and fostering partnerships with other organizations (state, local agencies, land trusts) to strengthen and complement NCTA efforts.
- Improving and supporting existing relationships with state and federal agencies for the management of the trail (eg. MOUs, communication).
- Increasing organizational capacity to monitor state and federal policy that can impact the trail.

Several respondents thought that the NCTA should take a step back and evaluate the location of strategic sections of the trail that need to be connected or built to draw people to that area. Does it make sense to create chapters just because a geographical area doesn't have an existing group? Or should we focus on building trail in areas that will provide a multiplier effect? Several respondents mentioned the importance of land protection but offered different strategies to secure the land: work with land trusts; use advocacy to secure the land; allow the NPS to take the lead on securing MOUs; use regional trail coordinators to foster partnerships.

*If major sub-regions of the NCNST were completed, there would be some attraction to draw visitors.*

*Moving away from purchasing from private landowners to working with land trusts that have been doing this for years, filling the gaps for continuous hikes. There should be more aggressive policy advocacy, I would hate to put a lot of effort into putting trail on public land and then not have it protected.*

*There really needs to be an eye on each state and what is going on at the state level.*

#### **OTHER COMMENTS**

When asked for general comments regarding NCTA's future direction, there was some concern that this was an ambitious overview, did the organization have the capacity and would the board and chapters play a role? Respondents were pleased that NCTA was requesting external feedback and thought that would enhance the final results. Some saw these strategies being very interrelated and hoped that the final implementation plan would be able to capture those interrelationships. One respondent strongly believed that corporate support was the most important catalyst for future sustainability of NCTA.

*The most important thing is getting corporate support and if that means paring down for a few years to build that support that is OK. This also means the board needs to restructure.*

*If we are going to use social media to raise awareness, how do we get those people involved? If we are going to strengthen partnerships with NPS/Forest Service, how do those partnerships strengthen fundraising?*

## APPENDIX F: INDEXED WEBINAR NOTES

### MAY 28, 2014 WEBINAR

- Andrea Ketchmark
- Jaron Nyhof
- Dick Swanson
- Tim Mowbray
- John Heiam
- Connie Julien
- Chuck Vannette
- Bruce Matthews
- Duane Lawton
- Bobby Koeplin
- Mike Stafford
- Tom Moberg
- Tim Hass
- Jerry Trout
- Doug Thomas
- David Cowles
- John Heiam
- Ron Sootsman
- Ed Ronkowski
- Mark Weaver
- Larry Pio
- Laura DeGrolier
- Gaylord Yost

### JUNE 5, 2014 WEBINAR

- Andrea Ketchmark
- Mary Coffin
- Loren Bach
- Ray Vlasak
- Ron Rice
- Bruce Matthews
- Doug Thomas
- Lorana Jinkerson
- Don Miller
- Reggie Krueger
- Bob Kahl
- Debbie Zampini
- Lynda Rummel
- Pat Monahon
- Brian Pavak
- Dave Adams
- Eileen Fairbrother
- Florence Hedeem
- Jeff Manelick
- Peter Nordgren
- Tom Moberg
- David Cowles

**Comments from webinar participants were recorded. They have been condensed somewhat and are shared below, indexed to the Strategic Plan wherever appropriate. These comments reflect the combined input from the webinars held on May 28 and June 5. Wherever possible the numeric reference number refers to that section or sections of the Plan where the comment is addressed.**

**INITIAL REFLECTIONS/FEEDBACK:**

- The plan seems well organized at this point in time
- Use Letters instead of numbers if we aren't prioritizing them.
- The plan should be more of a bottom up, not top bottom. **(1.5)**
- A few issues more important than others - sustainability of the organization **(3.0)** and awareness of the trail **(1 & 2)** need to raise to the top. Younger people **(2.1)**
- Chapter mostly older folks - need youth but don't have a lot of people to pull from. Interest in hiking but not working. **(2.0)**
- Build maintain and protect should be higher priority - building trail is difficult for a small chapter. **(4.0)**
- Worrying about protecting a trail corridor is a new world. and working with multiple agencies can be confusing. **(4.2)**
- Coordination is difficult
- Need to know who the decision makers are at the beginning on trail development. **(4.2)**
- Visibility is a huge issue **(1)**
- Small populations is an issue
- Need signs on Trail crossings on highways/roads **(1.3.C)**
- Adding RTCs would help. Bill Menke works great. **(4.5.B)**
- Mapping--appeal to young people? **(1.D.2-3; 1.3.6)**
- Use apps? **(1.3.F.1)**
- Strategies 1&2 are like one big strategy
- Seems to match previous strategic plans
- How is this a Living document, how does that roll out in the implementation
- Won't the board review of the plan and the self-review of the board itself need to be part of the living aspect of the document **(5)**
- We should make sure chapters are included all along the strat plan process, chapter leadership interviews Bruce conducted last year seemed to be included in this process **(1.5)**
- Few leaders in chapter. Only 3 active leaders - what do you do when you leave? Each person wears a lot of hats. **(4.2)**
- Need to keep new things happening to keep people engaged.
- Spending time maintaining poorly built trail. **(4.2)**
- We should be growing the product, not the brand. Better design, better maintained, better marked. **(4.2)** Signs at road crossings. People need to find it and they need to enjoy it when they find it. **(1.3.C)**
- Strategy is misdirected. Need a bottoms up strategy, not top down. **(1.5)**
- Working with land trusts could be successful. Need to do more of it. **(4.3.A)**

- Quality Trail is they key. **(4)**
- Wants to see chapters and trail councils trained in mechanized trail building equipment.
- Frustrated that feels like board feels that volunteers are unskilled. **(1.5)**
- More worry about covering our butts than building the trail. Too many rules. Chainsaw training for example is overboard.
- Lack of blazing and signing. Blazing is a safety. **(1.3.C)**
- Chapters and Councils should have more authority. **(1.5)**

#### **HIGHLIGHTS TO SHARE WITH LARGE GROUP:**

- Better design, better maintained, better marked trail will market itself. Without the trail we don't have anything. **(4)**
- More support of the chapters. That's were membership is built. **(1.5)**
- Impressed at depth of conversation and individuals involved
- Good core to build on
- Need to increase capacity to attract younger people--to help us older folks--develop programs to interest younger people **(2.0)**
- We see lots of seniors--need to get younger folks involved; need to compete successfully with other things like sports **(2.0)**
- Awareness--use local media to get out weekly updates on the trail **(1.2.B; 1.2.E.2; 1.2.F.2)**
- Present tense is important--but so is future--need to focus on future
- Share strategies for what works **(2.3; 4.2)**
- Sustainability--financial, planned giving, corporate support **(3)**
- Target empty-nesters—**(2)**
- Working with organized youth groups like scouts **(2)**
- Let's not forget that younger folks can also support through joining and paying dues **(2)**

#### **ROLES CHAPTERS CAN PLAY:**

- Work with each other in coordinating fund raising **(3.6.D)**
- Local youth outreach--its where rubber hits road **(2.3)**
- Each goal needs continued input from all orgs/chapters along trail--sustained engagement. **(1.5)**
- Really want to delve into the point of marketing. Promoting the trail, really like seeking new audiences. **(1)**
- Peter: Curious about Development of Chapter Leadership was in conversation?
- Tom: There is final point on Strategy 1 re: Chapter engagement and that focus is important. **(1.5)**
- Peter: I think leadership development in Chapters is really important to achieving many of these goals.**(1.5)**
- Florence: The plan calls for a dev associate - chapters need that assistance, harder to get local donors to donate to the larger NCTA **(3.6.D)**

- Brian: We need to take a big look at the national picture of what we are trying to accomplish with the plan. Kudos for all the work on plan so far.
- Tom: the concept of one continuous trail is what hit him/me in this process
- Plan day hikes to get people acquainted with the Trail.
- Events for trail runners
- Meetup is working well
- Outreach to universities if there are any **(2.1)**
- Eagle Scout projects
- Coordinate with other organizations **(4.3; 4.4)**
- Increase chapter engagement--need to get more members active--increase recognition and rewards. **(1.5)**
- More competitive activities
- Chapter finances--equity, eligibility for FG's --level playing field. Get FG \$ to weak chapters.**(1.5)** local signage **(1.3.C)**
- Make sure national HQ is connected with local chapters--need to have NCTA staff and NPS staff show up locally **(1.5)**
- Local relationships **(4.3)**
- Easement acquisition--coordination at HQ **(4.5.B)**
- They can become aware of these strategies and spend time in chapter meetings discussing items for them to act upon
- Let chapters know they can engage me to fundraise locally **(3.6.D)**
- Make sure we have regular contact with the chapter (monthly) using online tools like Survey Monkey **(1.5)**
- Work with each other in coordinating fund raising **(3)**
- Local youth outreach--its where rubber hits road **(2.1)**
- Each goal needs continued input from all orgs/chapters along trail--sustained engagement.**(1.5)**
- Brian: one crazy idea - if people can donate locally, that may be the way to funnel to national. **(3.6.D)**
- Florence: People that pay dues think it all goes national, they need to be better informed about what it really pays for. They need to know that dues don't cover the cost of the org. - donations are critical **(1.5)**
- Peter: future role of marketing position - seems likely that this person will work on consistent materials for chapter - this will be an important way to get the message about how the local and national work together. **(1.2.E.2; 1.2.F.2; 1.3.D-E)**
- Florence: appreciate print material. but developing outreach that uses digital and online, social materials are critical to reach new younger audience. **(1.2.B)**

## **QUESTIONS/ISSUES STILL UNANSWERED:**

- Mapping?? How do we address it?
- What is the desired future of state of Organization? Trail?
- How do we measure progress?
- Role of BoD tied to building relations with chapters
- Priorities in closing gaps?
- How can we get better cooperation with state agencies?
- Role of RTC program? RTC's in every state?
- Easement acquisition--coordination at HQ/sharing or info/avoid reinvent the wheel
- How do we get young folks involved so they'll follow after us
- Sustainability--planning for financial future--how can we ensure? Find experts to help us plan for the future
- Jeff: the importance the chapter plays in national awareness is critical, Allegheny 100 funds some local, some national. encourage chapters to take active role in promoting.

## **KEY HIGHLIGHTS TO SHARE WITH LARGE GROUP:....**

- Get more feedback from chapters as we work out strategy #4. **(1.5)**
- The need for more younger volunteers. **(2.1)**
- We've covered it with these strategies
- David Cowles' expertise
- SPWG on the right track
- 1. Communication with the generation that is coming up – millennials **(2.1)**
- 2. Communication about how dues are spent **(1.5)**
- 3. Marketing the trail is critical **(1)**

## **OTHER CLOSING FEEDBACK**

- When people sign in, ask them to put the chapter in their Name Box (Bobby)
- Less introduction and have more key questions in the breakout rooms (Bobby)
- Consider addings signs at every road crossing of the trail, approach state departments of tourism for support (Connie)
- Recording and PPT will be emailed in the next week.
- Joyce: I really think we need to strengthen marketing. We also need to find ways to support chapters in building trail.