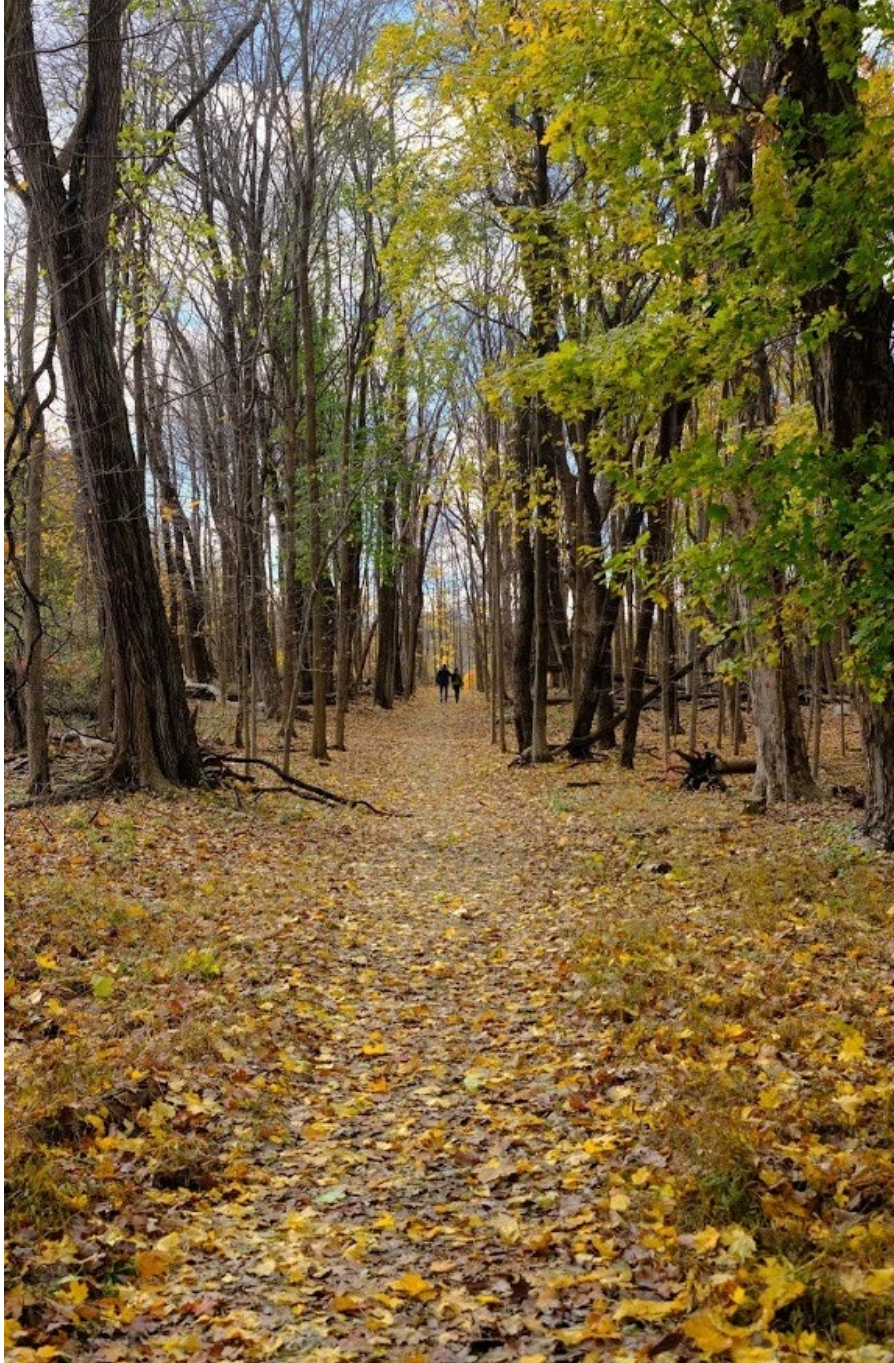# *New York-New Jersey Trail Conference*
5-Year Strategic Plan (2022 - 2027)

Approved by the Board of Directors on July 26, 2022

Contents

Our Mission

The New York-New Jersey Trail Conference is a volunteer-powered organization that builds, maintains, and protects public trails. Together with our partners, we strive to ensure that the trails and natural areas we share are sustainable and accessible for all to enjoy for generations to come.

Our Values

- The joys of nature belong to everyone.
- All people—regardless of age, ability, or location—should be able to experience the rewards of connecting with nature.
- Environmental conservation is a shared duty.
- We must preserve the integrity of our natural world—not only to sustain our trail systems, but to ensure future generations can enjoy the outdoor experiences a healthy planet has to offer.
- Volunteers are our superheroes.
- Creating and protecting trails is a labor of love. We celebrate our volunteers—their passion, dedication, and leadership make the trails we all love possible.
- Respect is essential to success.
- In our partnerships, we exercise the same courtesy we advocate for on the trail, and we strive to be a trusted source of information and expertise for the trail community.
- The right path is always a responsible one.
- We take land stewardship seriously and approach every decision—whether we're out in the field or in our headquarters—with balanced judgment and firm conscience.
- Sustainability is fundamental to a healthy organization.
- We will generate and raise an appropriate level of awareness and income to support the needs of the organization.

Executive Summary

The New York-New Jersey Trail Conference (NYNJTC) 2022 Strategic Plan was developed and written by Volunteers, Staff, and Board Members. Members of the Board Strategic Planning Committee were actively involved in the 18 months of meetings and discussions that developed this Plan. An analysis of strengths (Table 1) and weaknesses in the current Strategic Plan, was followed by a 2021 internal survey that identified NYNJTC **Strengths, Opportunities, Aspirations, and Results (SOAR)**. In spite of unprecedented events (senior management changes, Covid-19 pandemic) that occurred after adoption of the 2017 Plan, by 2021 the NYNJTC had made significant progress toward realizing the objectives (Table 1) in this Plan.

Table 1. 2017 - 2022 Strategic Goals and Results

GOAL FOCUS	OBJECTIVES	ACCOMPLISHMENTS
1. Visibility	Raise visibility through improved branding, messaging, marketing	Participation in NY State committees and advisory groups; Coordinator of NY State PRISM Lower Hudson; Increased interactions with NJ at Federal, State, and County governments; Trail Steward program growth; Digital responses to Covid in person restrictions
2. Volunteers	Strengthen volunteer support and management	Volunteer management program restructured; onboarding training initiated; volunteer satisfaction at 99%; volunteer leadership vacancies reduced to 3 (2021); digital volunteer reporting system in *beta* testing (2021)
3. Trails	Expand design & construction capabilities	Initiated Land Manager Surveys (2019). Trail Plan Services provided for 7 partners. Iconic Projects at 8 locations Increases in Trail Builder positions and Corps Crews
4. Financial	Increase annual revenues	Revenues over $3 million; Operating breakeven in 2020; Grant contract income increased 42% (2021 vs. 2017); Centennial Gala net revenue$250,000; Major Gifts (+$2,000) +90% over 2017

After a seven-year period of rapid growth ((2015 – 2022), NYNJTC is now challenged to find the capacity needed to meet demands from land managers, partners, and the general public. A staff of 24 and volunteer force of 2500 are responsible for 2,100 miles of trails located in two states, spanning 21 counties. All Program Area Directors believe workloads are beyond current capacity. It was clear after the SOAR Workshops that each Program Area is functioning largely independently, with minimal integration of programs or coordination of Best Practices.

The 2022-27 NYNJTC Strategic Plan attempts to address these issues. The overarching objective is to transform NYNJTC into a more integrated, focused, efficient, and professional organization. Five organization-wide Strategic Goals were developed to support this objective.

2022-2027 Strategic Plan Goals

1. *DEVELOP AND IMPLEMENT A TECHNOLOGY STRATEGY*

The current Trail Conference technology capabilities have failed to keep up with the growing scope of our programs, greater needs of staff and volunteers, and rapid advances in available digital technologies. This strategic plan calls for significant improvements in NYNJTC technology infrastructure that will greatly increase the efficiency and satisfaction of staff and volunteers, and allow us to better meet the needs of a wider range of today's trail users.

2. *MAXIMIZE STRENGTHS IN EXISTING NYNJTC PROGRAMS – LONG DISTANCE TRAILS*

Long Distance Trails (LDTs) focus NYNJTC expansion efforts, maximize existing trail sections, and provide multiplier effects that leverage trail building and land acquisition efforts. LDTs present a unique opportunity for the NYNJTC to partner with various local groups and funders, potentially attracting new volunteers and partners. Improving and expanding these trails increases hiking opportunities, supports establishment of trail connections within the region's fragmented landscapes, improves ecological habitat connections through creation of "Green Corridors", supports preservation of public lands, and increases the presence and visibility of the Trail Conference within the northeast corridor. Successes on LDTs can be employed to positively impact localized trail building efforts. Today, there are two LDTs managed by the NYNJTC - the Long Path and the Highlands Trail – publicly viewed as NYNJTC trails spanning the region served by the Trail Conference. NYNJTC has invested six decades in the Long Path (since 1960), and involvement in the Highlands Trail has been ongoing for almost three decades (since 1995). Focusing strategic efforts on improving and ultimately completing LDTs, and promoting these trails to the hiking public, involves an emphasis on NYNJTC core competencies: Trail design and building, Trail and Ecological Stewardship, Land Conservation and Publications. Protecting more land and then transferring these lands to other agencies provides the ongoing LASF replacement funding needed to expand conservation and trail stewardship activities through creation of trails that showcase the Mission of the NYNJTC.

3. *INTEGRATE ECOLOGICAL & TRAIL STEWARDS INTO TRAIL MANAGEMENT & BUILDING*

Land managers are looking to the NYNJTC for services that go beyond the building and maintenance of trails. As the number of trail users grows and the regional climate changes, environmentally sustainable trails and protection of natural habitats is rapidly becoming an urgent priority. The NYNJTC is uniquely positioned to address these challenges through the Trail Stewards and the Ecological Stewardship Programs. Trail Stewardship has evolved into a service much in demand by landowners who manage high traffic trails. These individuals are a "public face" of the Trail Conference mission. Ecological services have grown significantly since their introduction, funded by the NY State PRISM contract that supports Corps Crews and fosters new partner collaborations. Connecting the three programs (Trail Building, Trail

Stewards, and Ecological Stewards) enhances and leverages NYNJTC efforts, making NYNJTC a stronger partner for regional efforts that enhance and protect public trail lands.

Integration of these multiple services, supported by Publications efforts, will be a significant new direction for NYNJTC, and requires communication and coordination between the various programs, which can evolve organically over the next five years. Actions that support integration of the Stewards and Trail Builders and Maintainers include establishing joint Pilot Projects in Harriman State Park (a willing landowner) to evaluate activities that facilitate these three groups working jointly on trail projects.

4. *DEVELOP A NYNJTC ROADMAP FOR DECISION MAKING TO SUPPORT STRATEGIC OBJECTIVES*

Currently, each program makes independent judgements of how time and effort can be best deployed. Duplication of effort is occurring across Program Areas and all programs report being stretched beyond current capacity. In order to maximize everyone's best efforts an internal process needs to prioritize and align large organization-wide projects to create the largest benefits, greatest efficiencies, and leverage from our efforts. An organization-wide set of basic standards allows rapid evaluation to determine whether a new project is a strong fit with the NYNJTC Mission, has long-term public benefits, and is achievable with existing NYNJTC resources. Should a beneficial project not be a good fit with NYNJTC criteria, a standardized process is needed for suggesting appropriate alternative options or partners.

5. *ACHIEVING FINANCIAL OPERATING SUSTAINABILITY*

The Board identified financial sustainability as an urgent priority in 2019 when the Financial Sustainability Task Force was initiated. This Task Force encouraged senior management to reorganize the budgeting process and tighten expense controls, which resulted in positive net operating results in 2020-21. While continuing the focus on annual operating financial sustainability, in order to achieve the multi-year Organizational Goals detailed in this Strategic Plan strategies must be developed to find new sources of annual revenue. The most significant new strategic expense supports the Technology Strategy of improved IT infrastructure and capacity, IT support staff, and annual licensing fees for a commercial CRM. Funds may also be required to expand Stewardship activities. The NYNJTC is also conducting an analysis of the current staff salary structure, which may need to be updated to retain outstanding staff and to attract a more diverse staff. When an Advancement Director is in place by the end of 2022, the immediate focus should be on drafting a fundraising Strategic Plan that builds on the CSS campaign assessment and supports Strategic Plan goals.

DIVERSITY, EQUITY, & INCLUSION (DEI)

In the 2021 SOAR Survey the identified NYNJTC *"Aspiration"* with the highest score was DEI. However, relatively few specific actions to increase diversity surfaced during the subsequent Workshops and meetings. While the general population and the hiking public on many trails in the NY-NJ metropolitan region are comparatively diverse, this diversity is reflected less so in the Board, staff, volunteer or club ranks of the NYNJTC. The NYNJTC can aspire to be a leader in

helping people of all demographic backgrounds feel welcome on trails by having volunteers, clubs, staff, and Board members that reflect the demographics of the NY - NJ metropolitan region. The NYNJTC Diversity, Equity and Inclusion Policy was approved on October 27, 2021by the Trail Conference Board of Directors. Reaching this goal will require thoughtful effort and changes in the way the Trail Conference attracts, recruits, and retains a diversity of individuals. Various strategies may be required to recruit a more representative Board, staff, Corps members, volunteers and clubs. The challenge over the next five years is to identify and implement strategies that can broaden current approaches that contribute to building a more representative organization.

ROLE OF THE BOARD

Strategic Planning is a Board responsibility. Board Strategic Planning Committee (SPC) members were actively involved in meetings and discussions that developed this 2022 Strategic Plan. The SPC members are also involved volunteers participating in activities and actions highlighted in this plan. Having the SPC continue to partner with the Executive Director, key staff members, and volunteer leaders to focus on actions needed to achieve the KPIs would increase the Trail Conference's capacity to monitor and support progress. The committee is proposing that the SPC continue to track quarterly metrics, as well as participate in discussions with staff and volunteers related to Strategic objectives as part of the annual budget preparation process. Strengthening Board involvement in understanding the actions needed to achieve these goals will aid the Board in its Strategic Planning role. This partnership could potentially enhance Board knowledge of, and support for, actions the Trail Conference can take to achieve and exceed the 2022 Strategic Plan Goals.

STRATEGIC OBJECTIVES & KEY PERFORMANCE INDICATORS (KPIs)

A Strategic Plan is meaningful when there are specific achievable objectives that are measurable, accompanied by metrics to evaluate movement towards those objectives. This plan contains 5 Strategic Goals, with 32 specific objectives spread over a 5-year time period. Objectives requiring addition funding have been noted, as have Objectives that it is anticipated would be covered by annual operating income. There are 35 Key Performance Indicators (KPIs) to measure NYNJTC movement toward achieving these Objectives (Table 2). Objectives have been divided into Short-Term (2022-23) (11 Objectives), Medium-Term (2024-25) (11 Objectives), and Long-Term (2025-27) (10 Objectives) time periods and it is expected that progress in meeting these objectives will be highlighted in the Executive Director's and SPC quarterly Board reports. The SPC is also working with the Executive Director to determine ways that the SPC Board Committee may support annual Strategic progress reviews with staff and volunteers, as well as the integration of Strategic Plan goals into the annual budgeting process.

Table 2. Goals, Objectives, and Key Performance Indicators (KPIs)

SHORT TERM: 2022-2023	OBJECTIVE	KEY PERFORMANCE INDICATOR	TC OPERATING FINANCIAL IMPACT
Technology Goal 1	Establish an internal Technology Task Force	Appoint Technology Task Force & members	None
	Complete BOT Review & Recommendations	Report to Management & Board Funding	None
	Migration to SalesForce Nonprofit Cloud CRM	CRM Migration Complete Appoint Project Manager (Consultant)	CRM & Consultant - Capital Expense
	Set up GIS Workgroup	Report describing GIS needs	None
Maximize Existing - LDTs Goal 2	Collect internal data needed to complete Trail Plans and Guides LP & HT	Documentation of existing conditions, suggestions for future projects, recommended improvements (including Green Corridors), land acquisition targets to guide planning and future volunteer work % of LDT miles included in formal Trail Plans	Covered in Operating Budget
Integrate Stewards & Trial Management - LDTs Goal 3	Increase integrated messaging into maps, books, other outreach and education materials	# of items containing holistic trail messaging	Covered in Operating Budget
	Cross Train Trail & Ecological AmeriCorps Stewards	# of Stewards cross trained	Covered in Operating Budget
	New Maintainers' Cross Training	Develop appropriate Training Module Number of new Maintainers cross trained	Covered in Operating Budget
Roadmap for Decision Making Goal 4	Decision Roadmap Task Force established	Specific criteria developed for all Program Areas - Organizational Recommendations	Covered in Operating Budget
Financial Operating Sustainability Goal 5	Hire Advancement Director Complete Salary Review	Advancement Director in place Board approved Compensation Plan	Salary in Approved 2022 Budget
Diversity, Equity, & Inclusion (DEI)	Baseline DEI data	Collect DEI data regarding diversity of Board, Staff, Volunteers, and Club components of the NYNJTC	Covered in Operating Budget

NEW YORK-NEW JERSEY TRAIL CONFERENCE STRATEGIC PLAN 2022-2027

MEDIUM TERM: 2024-2025	OBJECTIVE	KEY PERFORMANCE INDICATOR	TC OPERATING FINANCIAL IMPACT
Technology Goal 1	Operational CRM Enhancements	Automated Communications, Volunteer Field Reporting, Wholesale & Retail Sales, Inventory, & COG Integration with QuickBooks, Excel based activities to CRM	Annual License Fees Project Manager Cost
	Initial GIS Capabilities	TBD by GIS Workgroup	None
	Drupal 9 & Website Upgrades	Board Approval & Completion of CMS migration	CMS Cost of Migration
LDTs Goal 2	Create Trail Plan for LP & HT	Number of completed Trail Plans	Covered in Operating Budget
	Convert LP & HT GIS content for public Trail Guides	Number of digital self-reported thru-hikers	Covered in Operating Budget
		Number of GIS interactive maps, narrative descriptions of hiker, overnight/water resources, and interpretive materials to guide thru-hikers along LDTs	Covered in Operating Budget
Integrate Stewards & Trials Goal 3	Harriman "Full Service" Pilot Project	In collaboration with land manager, develop comprehensive integrated Pilot Project(s) for testing integration in Harriman State Park	Covered in Operating Budget
	Conduct Inventory & Assessment of Education & Outreach Offerings	Report with analysis of communications we are producing, effectiveness of efforts, gaps in offerings, and recommendations to improve consistency among offerings.	Covered in Operating Budget
Roadmap for Decision Making Goal 4	Task Force evaluates recommendations and develops draft organization Decision Roadmap criteria	NYNJTC adoption of final organization minimum criteria for new initiatives	None
	Beta testing of criteria	Revision(s) if needed	Covered in Operating Budget
Diversity, Equity, & Inclusion (DEI)	DEI Annual Reporting	Annual reporting of DEI data and actions taken in response to DEI trends for Board, Staff, Volunteers, and Clubs	Covered in Operating Budget

Financial Operating Sustainability Goal 5	Formalize Development Plan Tracking Metrics Finalized	Completed 4 Year Development Plan integrated into Annual Operating Budgets & Strategic Plan Goals Quarterly Report to the Board	Covered in Operating Budget
LONG TERM: 2026-2027	**OBJECTIVE**	**KEY PERFORMANCE INDICATOR**	**TC OPERATING FINANCIAL IMPACT**
Technology Goal 1	Future Needs	Enhanced field reporting for volunteers and stewards, Website migrated and redesigned	Annual License Fees
	Additional GIS Capabilities	TBD by GIS Workgroup	GIS License Fees; GIS Staff
Maximize Existing - LDTs	Publish Long Path & Highlands Trail Guides	Number of LDT Guides available online	Covered in Operating Budget
Goal 2	Add LDT Volunteers and Trail Crews	# of LDT Volunteer hours # of Volunteer LDT crews	Covered in Operating Budget
	Increase LP offroad mileage	Add 20 miles of off road	Covered in Operating Budget
	Finalize HT East of Hudson Route	Highlands Trail Map East of Hudson	Covered in Operating Budget
Integrate Stewards & Trials - Goal 3	Pilot & Maintain "Invasive-Free" or "Native Species" Trails	Implement and evaluate results of Harriman Pilot Project(s) # of integrated trail projects	Covered in Operating Budget
Roadmap for Decision Making Goal 4	Implementation of Decision Roadmap criteria by all Programs	Task Force recommended revisions of criteria as needed	Covered in Operating Budget
Financial Operating Sustainability Goal 5	Income Diversification & Philanthropic Program Improvements	Evaluation of Tracking Metrics as Measurements of Fundraising Success	Covered in Operating Budget
		Additional Fundraising Metrics as Technology upgrades allow	Covered in Operating Budget
		Funding secured for IT improvements	New Funding
Diversity, Equity, & Inclusion (DEI)	DEI Triggers	Establish "Triggers" of little progress within the various Trail Conference constituencies leading to review and rethinking of DEI practices.	Cost dependent on actions taken in response to Triggers

Introduction

The New York-New Jersey Trail Conference (NYNJTC) Board of Directors approved the organization's current five-year Strategic Plan on January 31, 2017. The 2017 Strategic Plan was developed based on surveys of 339 Trail Users, NYNJTC Volunteers, staff, and Board members. Board approval of this plan followed a decade of rapid organizational growth, reorganization of the volunteer structure, restoration, construction and opening of the historic Darlington Schoolhouse headquarters building in Mahwah, NJ, and a continuing shortfall in the annual revenues required to support the NYNJTC's operating expenses.

In the five years following adoption of the 2017 plan, the NYNJTC faced and overcame significant obstacles. In 2019 the long-term Executive Director departed and a new senior management team was appointed. This change in organizational leadership resulted in a restructuring of staff positions and responsibilities. In 2020-2021 the NYNJTC mounted a strong response to challenges imposed by the Covid-19 pandemic. Covid-related hurdles included operating restrictions and an enormous increase in the public's demands for safe outdoor experiences and use of recreational trails[1]. Concurrently, social awareness of diversity, equity, and inclusion (DEI) barriers related to making trails and nature experiences accessible to all increased.

In spite of the unprecedented events that occurred after adoption of the Plan in 2017, through 2021, the NYNJTC was able to make significant progress toward realizing the goals in this Strategic Plan (Table 3).

Table 3. 2017 - 2022 STRATEGIC PLAN GOALS & ACCOMPLISHMENTS

GOAL FOCUS	OBJECTIVES	ACCOMPLISHMENTS
1. Visibility	Raise visibility through improved branding, messaging, marketing	Participation in NY State committees and advisory groups; Coordinator of NY State PRISM Lower Hudson; Increased interactions with NJ at Federal, State, and County governments; Trail Steward program growth; Digital responses to Covid in person restrictions
2. Volunteers	Strengthen volunteer support and management	Volunteer management program restructured; onboarding training initiated; volunteer satisfaction at 99%; volunteer leadership vacancies reduced to 3 (2021); digital volunteer reporting system in *beta* testing (2021)
3. Trails	Expand design & construction capabilities	Initiated Land Manager Surveys (2019). Trail Plan Services provided for 7 partners. Iconic Projects at 8 locations Increases in Trail Builder positions and Corps Crews
4. Financial	Increase annual revenues	Revenues over $3 million; Operating breakeven in 2020; Grant contract income increased 42% (2021 vs. 2017); Centennial Gala net revenue$250,000; Major Gifts (+$2,000) +90% over 2017

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[1] Covid-19 and Trails (2020). (http://www.americantrails.org.)

2017 GOAL 1: INCREASING VISIBILITY

The objective of this goal was to strengthen external recognition of Trail Conference organizational assets and the importance of trail work performed by NYNJTC. Identified activities to raise visibility focused on branding, messaging, marketing, and advertising plans. Identifying measurable indicators to track changes in visibility was challenging. Key Performance Metrics to measure attainment of this goal included: Trail User Surveys, number of interactions with key elected officials, partner support for projects, land manager requests for Trail Conference services, website and social media analytics, and media mentions. These metrics were adjusted during the five years covered by this plan, with increased emphasis placed on digital measurements from 2019 onward.

VISIBILITY: RESULTS

- Interactions with key elected officials, partners, and land managers:
    - NYNJTC was appointed a member of the: Open Spaces for All Steering Committee (committee recommendations being sent to the Governor's Office, NYS DEC and OPRHP Commissioners); Catskill Advisory Group with NY DEC, (recommendation from interim report resulting in a new NYS DEC staff position of Catskill Coordinator); NY Outdoor Recreation Coalition steering Committee.
    - Communication has been established with NJ DEP Commissioner to seek funding for the Trail Conference; NYNJTC was invited to participate in NY State Senator Hinchey's press event for the Ashokan Pumped Storage project and hiked with NJ's U.S. Senator Cory Booker (2021).
    - NYNJTC is regularly meeting with leaders from ADK, CDT, PCTA, FTA, AT, CTA, AMC, PIPC, ATC, Catskill 3500 Club, Morris and Bergen County Parks, Black Rock Forest, REI, Leave No Trace, Catskill Center, Minnewaska State Park, OPRHP Regional Directors, FPAC, CPAC, as well as our donors, members, volunteers, and staff.

- NYNJTC is the designated NY State PRISM Coordinator responsible for invasive species removals and citizen science in the lower Hudson Valley. This 5-year position was fully funded by NY State, and the contract is up for another 5-year renewal in 2023.

- Trail Stewards Program staffing model changed from part-time hourly staff to AmeriCorps and other volunteers on peak days (Saturday and Sunday). Catskills added two Steward locations; Croton Gorge Unique Area and Minnewaska added AmeriCorps Stewards. NYNJTC Volunteer Stewards are working in Fahnestock and Highlands State Parks, and in partnership with other organizations at the Ashokan Rail Trail.

- Land Manager User Surveys initiated in 2019, Satisfaction has increased in all categories:
    - 2019 - Trail Management & Construction 89% Satisfied; 2021 - 98% Satisfied
    - 2019 – Ecological Stewardship 97% Satisfied; 2021 – 100% Satisfied
    - 2019 - Trail Stewards 85% Satisfied; 2021 – 88% Satisfied

- Utilizing digital metrics was impeded due to falloff in website traffic following the 2016 upgrade. The Strategic Planning Committee (SPC) determined that simply noting the number of website or social media page hits was not a useful metric without tracking what additional interactions were generated through the various digital platforms. Conversion tracking to analyze the effects of social media commenced in 2020 (beginning of Covid restrictions).
    - Began using Sprout (social media management platform) to analyze Facebook, Instagram, and Twitter impressions, engagements, total followers (increases of 11%, 60%, and 29%, respectively, versus 4th Qtr. 2019). These increases continued through 2020, but rates of increase fell or decreased as Covid-restrictions relaxed in 2021.
    - Website – 50% increase in 1st Qtr. new users versus 2019; jumped to 70% in March 2020. However, there was still a 34% decrease in pageviews versus the 2016 pre-computer upgrade results. Website page views continued to increase in 2020, but rate of increase fell or decreased as Covid-restrictions relaxed in 2021.
    - By the end of 2020, conversion tracking enabled analysis of website donations and Trail-A-Thon fundraising, number of impressions, and number of people taking action on posts. Event registration was also taking place online, as were submissions for Volunteer openings.
    - Number of social media platform and traditional press mentions increased significantly due to articles related to Covid-safe outdoor activities.

2017 GOAL 2: STRENGTHEN VOLUNTEER MANAGEMENT CAPABILITIES

Volunteers, identified in the 2017 Strategic Plan as the heart of the NYNJTC brand, perform services offered to land managers, who are looking to the Trail Conference to provide volunteer management that results in consistent and high quality trail work. Meeting this goal required updating the NYNJTC volunteer management system to: 1) improve the organization's ability to recruit, train, and supervise volunteers; and 2) institute surveys to judge the effectiveness of these changes. Key Performance Metrics to measure attainment of this goal included: an increase in volunteer hours, an increase in volunteer satisfaction, and a decrease in open volunteer positions.

VOLUNTEER MANAGEMENT: RESULTS

- Revised Volunteer Management Systems
    - Established uniform baseline policies available online.
    - Maintainers are now required to finish training prior to placement.
    - Leadership recruitment now includes rounds of interviews prior to position offer.
    - New onboarding process for all new trail volunteer leaders.
    - Integration of AmeriCorps recruiting process for Trail & Stewardship Programs.

- Annual Volunteer Satisfaction Surveys
    - 2021: Highest volunteer satisfaction rate recorded in any annual survey.
        - Ecological Stewardship 100% satisfaction;

- ▪ Stewardship Volunteer reporting 90% completion rate;
- ▪ Training & User Education 88% satisfaction.
- • Recruited and placed 24 new chairs and supervisors in 2021.
- • Pilot program for trail volunteer digital completed *beta* testing (2021).

Although not addressed in the 2017 Strategic Plan, the Stewardship volunteer programs experienced tremendous growth in the last 5 years. By 2020, the Invasives Strike Force (ISF) Citizen Science Survey program had 287 individuals attending training workshops and volunteers who dedicated 1,686 survey hours. The program recruited 107 new volunteers who surveyed 350 miles of trail in 2020. The Lower Hudson PRISM YouTube Channel received over 50,000 views (roughly 4,000 hours of watch time) since its inception in 2020.

2017 GOAL 3: DEVELOP TRAIL DESIGN & CONSTRUCTION SERVICES

This goal was driven by requests from land managers and partners for services provided by the NYNJTC. Activities identified to support this goal were strengthening the NYNJTC capacity for trail layout and design, increasing the logistic support and skill sets of trail crews, increasing the number of trail builders, and undertaking iconic projects. Key Performance Metrics to measure attainment of this goal included: agency approved design plans/projects, construction hours, Trail Workshop participation, and an increased Trail Conference role in iconic projects.

TRAIL DESIGN & CONSTRUCTION SERVICES: RESULTS

- • A partner survey was initiated in 2019 and is now sent out annually
  - ▪ 2021 results: Trail Maintenance & Construction 98% satisfaction;
- • Trail Plan Services now provided for partners:
  - ▪ Catskill Water Discovery Center
  - ▪ Town of Cornwall-on-Hudson
  - ▪ John Boyd Thatcher State Park
  - ▪ Lake Superior State Park
  - ▪ Town of Montvale
  - ▪ Lake Hopatcong (new 5-year project)
  - ▪ Harriman Trail Planning (new 4-year project)
- • Iconic Projects: Iconic Projects were completed at:
  - ▪ AT Bear Mountain Trails Project (after 12 years of effort)
  - ▪ Other AT restoration & planning (Anthony's Nose, Pochuck Boardwalk, Wallkill bridge and boardwalk)
  - ▪ Highlands Trail (HT) connections between Hudson River and CT border; completion and blazing between Delaware & Hudson Rivers.
  - ▪ Long Path (LP) elimination of 5.5 miles of road walk bringing trail into wooded areas; progress connecting up to the Adirondacks.
- • Trail Builder & Crew Capacity Increases
  - ▪ AmeriCorps crew expanded from 32 (2017) to 47 (2021), a 47% increase
  - ▪ Conservation Corps Program Coordinator position created
  - ▪ Expansion of Trail Builder team from 1 (2017) to 3 (2022)

2017 GOAL 4: INCREASE ANNUAL INCOME

In order to sustainably support the mission of the NYNJTC, annual operating income must be equal to annual operating expenses. Actions identified to increase operating income included growth of membership, major donors, and initiation of a Centennial campaign. Key Performance Metrics to measure attainment of this goal included: annual revenues, number of memberships, financial results of a campaign to raise capital and endowment funds, and reaching total annual revenue of $3 million by 2021.

ANNUAL INCOME: RESULTS

- 2020 revenues exceeded $3 million, producing an operating surplus of $372,800 versus the 2017 operating loss of ($431,000). This goal was achieved one year ahead of target.
- 2020 contractual grant income exceeded $1 million, an increase of 42% since 2017.
- Membership has not grown since 2017, a situation that we are continuing to evaluate.
- CCS Fundraising were engaged as a consultant to support launch of a Capital Campaign. After evaluating NYNJTC needs, these experts recommended a multi-step, longer-term approach to fundraising in lieu of a onetime campaign. In 2020-21 NYNJTC focused efforts on improving individual giving programs, with the ultimate goal of creating a more robust major giving program. The Trail Angels planned giving program was initiated. A Resilience Fund was launched in 2020 to offset Covid revenue losses and expenses. The Development group was restructured. Based on CCS recommendations, the Development team is now focused on building a Culture of Philanthropy throughout the organization. This approach values three components: the value of organizational culture, the importance of philanthropy, and the link between philanthropy and fund development.
- Centennial Gala (2021 – postponed from 2020 due to Covid) produced $250,000 in net revenue. Board members participated on the staff-led committee that planned and executed this highly successful event, overcoming ongoing Covid restrictions.

Process for Developing the 2022-2027 Strategic Plan

The 2017 Strategic Plan was drafted by a hired outside consultant, based on interviews with 339 NYNJTC volunteers, staff, Board members, and trail users; goals and metrics were primarily developed by the consultant. Although significant progress was made in achieving some goals (Volunteer Management, Financial Operating Sustainability), monitoring progress toward other objectives (Visibility) proved to be more challenging. After working with this Plan for five years, it became apparent that not all program areas were able to measure performance in a timely way and goals did not address organization-wide strategic challenges. In some cases, staff did not have the tools needed to track data, to develop proposed plans, actions, and/or efficiently report results of identified strategic activities. Significant programs, such as Ecologic Stewardship, or critical strategic issues, such as technology needs, were not included in the 2017 Strategic Plan. Therefore, meeting or tracking the various plan metrics was often inconsistent and key strategic elements were not addressed or tracked.

When Senior Management and Board members on the Strategic Planning Committee (SPC) commenced the process of drafting the 2022 Strategic Plan, it was our collective belief that the skills needed to develop and implement a meaningful and useful Strategic Plan were available within the NYNJTC, without retaining an outside consultant. The approach proposed by Management was based on **SOAR** *(<u>Strengths</u>, <u>Opportunities</u>, <u>Aspirations</u>, <u>Results</u>)* **Analysis**

Figure 1. Description of a Strength, Opportunities, Aspirations, Results (SOAR) Analysis

(Fig. 1), which focuses on what an organization thinks it is doing well, what can be improved and what is most important to stakeholders.

"SOAR is a strategic planning framework with an approach that focuses on strengths and seeks to understand the whole system by including the voices of the relevant stakeholders. SOAR conversations center on what an organization is doing right, what skills should be enhanced, and what is compelling to those who have a 'stake' in the organization's success." SOAR is a ...positive approach to strategic thinking and planning that allows an organization to construct its future through collaboration, shared understanding, and a commitment to action."[2] Using the SOAR approach, the goal was to create a Strategic Plans that is more dynamic, creative, and optimistic, understood and supported by staff, volunteers, and Board members.[3]

The first step in the NYNJTC SOAR process was an internal survey sent to staff, Strategic Planning Committee and Board members, which included Volunteer representatives; 30 individuals participated in the survey, providing five hundred and twenty (520) responses to survey questions (Appendix I). Due to the open-ended natural of the survey questions, responses were somewhat challenging to analyze across all categories, but some trends did emerge (Fig. 2).

STRENGTHS	*ASPIRATIONS*
Service Engagement & Volunteers Trail & Stewardship Programs Organizational Relationships Extent of NY State activities	Connect People with Nature Capitalize on Program strengths & synergies Diversity, Equity, Inclusion (DEI)
OPPORTUNITIES	*RESULTS*

Increase in Outdoor Activities
Technology Improvements needed
Integration between Program Areas
Higher Demand for NYNJTC services
    (Trail & Stewardship)
	Volunteer Recruitment & Retention
	Standardization of internal processes
	Revenue Growth
	Satisfaction Surveys (Volunteers, Staff,
	    Landowners)

 Figure 2. NYNJTC SOAR Analysis Survey Results

These survey results were followed up with in person and Zoom Workshops, that included staff, volunteers, and Board members. Workshops were held in August (Ecological Stewardship), September (Trail Programs), November (Stewardship, Education, & Outreach), and December (Service Engagement). The goal of these meetings was to explore often diverse perceptions of current programs using the SOAR approach. Evaluating progress the NYNJTC has made since 2017, as well as new opportunities and current needs, can illuminate strategic objectives that build on NYNJTC strengths. These Workshops also surfaced synergies and efficiencies that can

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[2] Stavros, J. & Hinrichs, G. (2009). *The thin book of SOAR: Building strengths-based strategy.*
[3] Stavros, J. & Cole, M. (2013). SOARing towards positive transformation and change. *Development Policy Review*, 1(1), 10-34. Retrieved from:
https://www.researchgate.net/publication/259975881_SOARing_towards_positive_transformation_and_change

increase the organization's future impact and success in achieving the Trail Conference Mission of Connecting People with Nature.

SOAR WORKSHOP PROGRAM HIGHLIGHTS

ECOLOGICAL STEWARDSHIP – August, 2021

Priorities of the Ecological Stewardship Program are to protect, enhance and conserve high quality natural areas. This program attracts 300-400 volunteers annually, and also provides training (pesticide) for professionals. The Ecological Stewardship program has exhibited clear strengths in GIS use, data management, volunteer reporting, and online programming (LHPRISM YouTube channel and Workshops). Ecological Stewards have high volunteer and partner satisfaction as documented by annual surveys. The Program has a strong public education/citizen science aspect and has made major inroads in recruiting and working with local colleges and universities to engage with younger generations in trail work, in addition to recruiting members for the Conservation Corps program. The invasive species component has been awarded significant funding through the multiple-year PRISM contract from the State of NY. Successful leadership and coordination of PRISM has resulted in significant external media coverage of NYNJTC stewardship initiatives.

Figure 3. SOAR Ecological Stewardship Workshop

There is a desire to expand Ecological Stewardship to include habitat enhancement and restoration activities in conjunction with Trail building, design, and maintenance. Moving in this direction would require additional funding sources, and an increase in staff and volunteer capacity.

There are significant benefits that would result from greater integration of ecological stewardship activities with trail building and maintaining activities. Habitat changes (new native populations as species' ranges change in response to warming temperatures, increasing numbers of invasive species), and extreme weather events related to a changing climate will introduce new challenges for both programs. The changing uses and availability of various digital technologies is expanding opportunities for data collection and communication for all NYNJTC programs. There are significant opportunities to expand current and new initiatives into NJ if additional funding can be secured.

TRAIL PROGRAMS – September, 2021

NY-NJ Trail Conference is known for offering first class, nationally recognized staff development related to trails. There is a strong history of partnering with other organizations to build, maintain, and connect trails. These successful collaborations should be a priority to leverage NYNJTC capacity and expertise. The Trail Management Program is currently struggling to balance requests from users and land managers with their capacity of 1,100 volunteers available to respond to these needs. Various metrics (volunteer hours, trail miles) are collected for different reasons and for reporting to different constituents. The definition of "trails" is changing. Once consisting of primitive footpaths, today's trails are often wide, graded surfaces that can accommodate mixed uses, including wheel-based vehicles.

Creation and implementation of organization-wide criteria, reinforced by a decision-tree flowchart that supports prioritization of proposed new trail projects, is needed to allow NYNJTC to evaluate which projects the organization can/should take on. An efficient database and digital reporting capacity are needed to improve management of trail work. There is a critical need to implement digital data collection and visualization, and a desire to integrate user friendly GIS mapping to document and communicate trail maintenance and building activities to land managers and the general public. There is a desire to integrate Ecological Stewardship synergies with trail building and management and the AmeriCorps volunteer activities, particularly in light of issues related to climate change and multi-use trails.

STEWARDSHIP, EDUCATION, & OUTREACH – November, 2021

The discussions in this Zoom Workshop focused primarily on Trail Stewards and Leave No Trace (LNT). Although a relatively new service initiated in 2013, the Trail Stewards program is growing and there is increasing demand for Stewards from park managers, particularly those responsible for high traffic trails. Development of priorities and evaluation metrics for further expansion of this service are needed. Greater inclusion of AmeriCorps volunteers as Trail Stewards and the possible linking of Trail Stewards with trail maintenance and Ecological Stewards would further integrate the program into the overall NYNJTC mission. Trail stewards were frequently mentioned as key to effective communication with the trail using public and for achieving diversity equity and inclusion (DEI) goals.

Figure 4. Trail steward and hiking public

SERVICE ENGAGEMENT – December, 2021

In an attempt to more deeply explore synergies and opportunities for collaborations among the various volunteer programs, this discussion included managers of the three programs (AmeriCorps members, Stewardship and Trail volunteers). Significant improvements in supporting and managing volunteer activities have occurred in the last five years. Uniform baseline policies have been established and are available to all on the volunteer dashboard. Volunteers now apply via the NYNJTC website and receive an automated response. On-trail positions require completion of training before placement with a Trail Chair. Volunteer leadership recruitment now includes multiple rounds of interviews and onboarding led by the Senior Engagement Manager; all supervisors now receive an onboarding packet. Digital support for these activities is being added, and a digital volunteer reporting system has finished *beta* testing (2021).

Progress has been made in unifying AmeriCorps recruitment, training, and reporting so all Corps volunteers have a consistent and positive experience. An AmeriCorps leadership cohort has been established, staffed by former Corps members, which has been very successful. Crew Volunteer Days allow Volunteer leaders to request Corps members for specific projects, fostering interactions between these formerly separate programs, supporting further integration of all volunteer activities.

There are opportunities to further integrate Stewardship (Ecological and Trail) projects and processes across multiple NYNJTC programs. There is interest in increasing ecological restoration activities and maximizing the potential connections between trail building and ecological initiatives.

Figure 5. Harriman Crew – June 2021

Following the large Workshop meetings, six smaller meetings were held that included Board and Strategic Planning Committee members, the Executive Director, Program Directors, key staff members and invited volunteers. A critical outcome of the

larger meetings was all programs felt they are currently at maximum capacity. These smaller meetings focused on specific actions NYNJTC could take that support four identified organizational issues identified in the Workshop sessions: needed technology improvements to increase efficiency and effectiveness; increasing the impact and efficiency of current stewardship, trail building and maintenance activities; areas where possible integration of current activities would leverage NYNJTC effectiveness; and factors that make projects feasible versus factors that hinder productive use of Trail Conference resources. Proposed Strategic Plan Goals and KPIs are the outcome of these internal meetings.

2022-2027 Strategic Plan

The NYNJTC has experienced a seven-year period of rapid growth. Positive progress since 2017 includes budgeting and operating in a financially sustainable manner and Volunteer Survey results show high satisfaction. However, the NYNJTC is challenged to find the capacity needed to meet demands from land managers, partners, and the general public. A staff of 24 and volunteer force of 2500 are responsible for 2,100 miles of trails located in 2 states, spanning 21 counties. Program Area Directors believe workloads are beyond current capacity. It was clear after the SOAR Workshops that each Program Area is functioning largely independently, with minimal integration of programs or coordination of Best Practices. NYNJTC technology capabilities have failed to keep up with the greater demands of staff and volunteers and the rapid advances in underlying digital technologies.

In order to continue to provide a superior level of expertise for trail users and land managers, NYNJTC will now prioritize consistent work products, completing projects in a timely manner, communicating meaningful and reliable metrics to internal and external stakeholders, and strengthening financial support. The 2022-27 NYNJTC Strategic Plan addresses these issues. The overarching objective is to transform NYNJTC into a more integrated, focused, efficient, and professional organization. Effort is needed to understand and meet a wide range of expectations of new trail users (younger, digitally savvy, less experienced or less knowledgeable, more diverse), who are requesting different types of trail services (short-loop, running, mountain biking, multi-use or through-hiking trails, digital communications,) and land manager partners (trail user support, habitat improvements, sustainable design). To align the organization with these evolving needs, NYNJTC strategic goals for the next five years include:

➢ NYNJTC *Technology Infrastructure* must be brought up to a baseline level capable of efficiently supporting the needs of staff, land managers, volunteers, and the trail-using public, while being flexible enough to expand as new digital options become available. Identified technology needs include website management and content updates, customer relationship management (CRM) improvements, new GIS capabilities, and video.

➢ NYNJTC needs to *leverage programs and talents already in place*. Various programs exhibit different strengths – how can these strengths be translated across the entire organization and professional capabilities expanded?

➢ Two relatively *new programs (Ecological and Trail Stewards) can be more linked to, and integrated with, the core mission of the NYNJTC* – supporting a more holistic approach to the trail experience and appreciation of nature through trail use.

➢ How can we best determine *projects that fit NYNJTC Strategic imperatives when responding to demands from our constituents*? The NYNJTC needs a methodology and process that supports sound decision making so time and efforts best support the Mission and Strategic Goals are prioritized.

➢ Grow NYNJTC's *Culture of Philanthropy* in order to fund the 2022 Strategic Goals.

2022-2027 Strategic Plan Organizational Goals and Metrics

- ➢ *DEVELOP AND IMPLEMENT A NYNJTC TECHNOLOGY STRATEGY*

- ➢ *MAXIMIZE STRENGTHS IN EXISTING NYNJTC PROGRAMS – LEVERAGE LONG DISTANCE TRAILS*

- ➢ *INTEGRATE ECOLOGICAL STEWARDSHIP & TRAIL STEWARDS INTO TRAIL MANAGEMENT & BUILDING*

- ➢ *DEVELOP A NYNJTC ROADMAP FOR DECISION MAKING TO SUPPORT STRATEGIC OBJECTIVES*

- ➢ *DEVELOP AND IMPLEMENT A LONG-TERM FUNDRAISING STRATEGY*

1. *DEVELOP & IMPLEMENT A TECHNOLOGY STRATEGY*

The current Trail Conference technology capabilities have failed to keep up with the growing scope of our programs, greater needs of staff and volunteers, and rapid advances in available digital technologies. The Covid-driven 2020-2021 shutdown underscored the urgent necessity to upgrade NYNJTC technological capabilities. Some enhancements have recently been completed, including migrating files from an in-house server to the Microsoft cloud and introduction of Microsoft SharePoint. Staff training on these new features is ongoing. This strategic plan calls for significant improvements in NYNJTC technology infrastructure, primarily in the areas described below. These improvements will greatly increase the efficiency and satisfaction of staff and volunteers, and allow us to better meet the needs of a wider range of today's trail users.

Customer Relationship Manager (CRM)

A CRM is central to operations of the Trail Conference. The CRM stores all data on members and volunteers, records donations, generates email and paper mail, handles registration for events, and performs other administrative tasks. We currently use the free open-source CiviCRM software, but our implementation does not meet the needs of the NYNJTC. We do not have the staff capacity or expertise to optimize CiviCRM functionality or to perform the necessary maintenance and updates. Staff often rely on time-consuming manual processes which should be automated, and it is difficult to access or update certain data. Our primary technology vendor, Back Office Thinking (BOT) has evaluated NYNJTC systems, operations, and current deficiencies experienced by each Program Area. BOT recommends that NYNJTC move to a commercial CRM, proposing the SalesForce Nonprofit Cloud. SalesForce has a large range of built-in capabilities, valuable features are added frequently, it is easier to customize, and excellent documentation is available.

An improved CRM is the highest technology priority and must be the first step in executing a Technology Strategy. NYNJTC has evaluated available options and vendors in order to begin implementation as soon as funding is approved. Staff training is a critical component, so that staff will rely on the CRM and its functionality will continually improve, rather than developing work-arounds outside the system. Success will require a Trail Conference Project Manager to interface with the vendor and staff, and to manage staff training.

Website and Content Management System (CMS)

There is a strong need to update our website CMS and to refresh and reorganize the contents of the website. Support for our current CMS, Drupal release 7, is set to end on November 1, 2023, so it will be necessary to either move to a newer Drupal release or to a different CMS. The website content can be made more welcoming, more modern in appearance, easier to navigate, and easier to update. Volunteer recruitment, intake, "generic" onboarding, and training modules could be offered online, and virtual offerings including e-books could be introduced. In particular, the website hike finder is difficult to use and is not built on modern technology. Decisions must be made about which capabilities are important to retain, and how they can best be achieved. Removing obsolete data and improving search capabilities will also be prioritized.

Geographic Information System (GIS) and Related Technologies

We currently use ArcGIS effectively for cartography. Separate GIS databases have also been developed for individual Program Areas. All Program Areas expressed a strong desire for a single accurately-maintained NYNJTC GIS database, and for licensed software that supports all Trail and Stewardship operations, potentially with a variety of uses. For example, the current trail maintenance database might include GIS integration, volunteers might report problems on a map-based application from the field, invasives removal along GIS trail segments documented, interactive maps created to highlight trail features and locations, and Trail Management plans developed. The desired capabilities need to be clearly defined before implementation and additional staff capacity will be needed to support GIS database integrity and GIS applications. Forming a task force of both users and those with knowledge of GIS technology is a necessary first step.

We need to evaluate how best to use NYNJTC high-quality trail information and maps to meet needs of trail users, while securing the financial support needed for continued development of these resources. The ability to make publications and trail education content available digitally in multiple formants as downloads or e-books for purchase, and the possibility of offering NYNJTC maps in an app other than Avenza should be pursued.

Approach and KPIs

Technology improvements must be defined and implemented using a flexible approach, addressing key technologies first and adding capabilities incrementally according to priority as resources permit. Multiple facets of digital infrastructure must be integrated, and a strategy developed and implemented that can be expanded to meet future needs (Fig. 6). A technology project manager on NYNJTC staff is critical to interface with vendors, test new software, and

coordinate staff training. An internal Technology Task Force and a GIS Workgroup are needed to define user needs, study system and options, and make recommendations to the Executive Director.

In addition to these software enhancements, infrastructure such as internet access at the Welch Trail Education Center and hybrid meeting capabilities must continue to be upgraded.
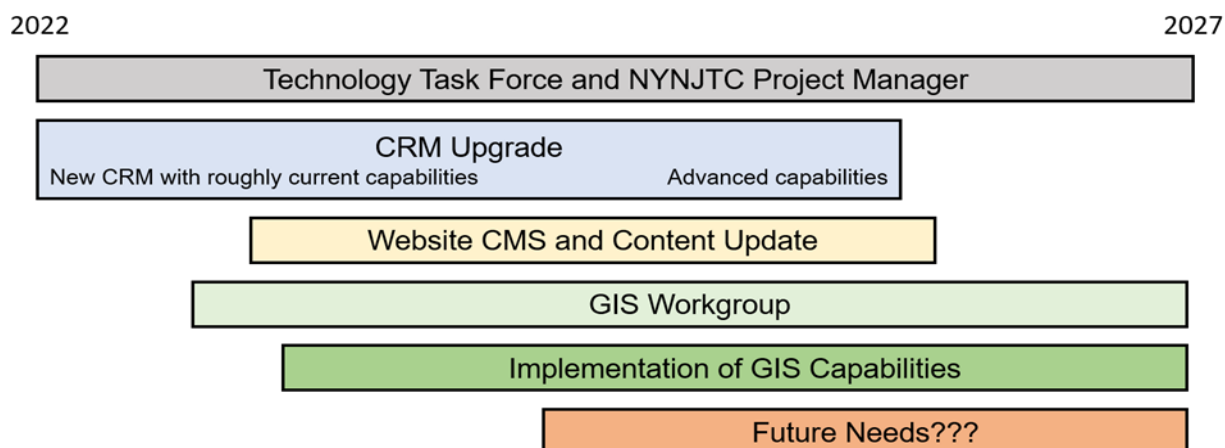

Figure 6. Schematic of a proposed timeline for developing and implementing the technology strategy

Strategic Action	Timeline	KPI
Establish an internal Technology Task Force Complete BOT Review & Recommendations Migration to SalesForce Nonprofit Cloud CRM	Short Term: 2022-23	Name members & Chair of Technology Task Force Appoint Trail Conference Project Manager Report to Management with Migration Roadmap Board Funding of licensed commercial CRM CRM Migration Complete
Set up GIS Workgroup that includes users to determine organization-wide GIS needs	Short Term: 2023	Report describing total organization GIS needs, including licenses, personnel, and annual overall costs
Operational CRM Enhancements	Medium Term: 2023-24	Automated Communications, Volunteer Field Reporting, Excel-based activities brought into CRM Wholesale & Retail Sales, Inventory, & COG Integration with QuickBooks
Initial GIS Capabilities	Medium Term: 2024	TBD by GIS Workgroup
Website CMS update	Medium Term: 2024	Board Approval of CMS migration funding Completion of CMS migration
Future Needs	Long Term: 2025-27	Enhanced field reporting for volunteers and stewards Website content migrated and redesigned Drupal commerce replaced if necessary
Additional GIS Capabilities	Long Term: 2026-27	TBD by GIS Workgroup

2. *MAXIMIZE STRENGTHS IN EXISTING NYNJTC PROGRAMS – LONG DISTANCE TRAILS*

The NYNJTC's long distance trail building expertise began with the first section of the Appalachian Trail (AT) in Harriman State Park[4]. Long Distance Trails (LDTs) focus NYNJTC expansion efforts, maximize existing trail sections, and provide multiplier effects that leverage trail building and land acquisition efforts. LDTs present a unique opportunity for the NYNJTC to partner with various local groups and funders, potentially attracting new volunteers and partners. Improving and expanding these trails increases hiking opportunities, supports establishment of trail connections within the region's fragmented landscapes, improves ecological habitat connections through creation of "Green Corridors", supports preservation of public lands, and increases the presence and visibility of the Trail Conference within the northeast corridor. Successes on LDTs can be employed to positively impact localized trail building efforts. Aside from the AT, our commitment to which is unchanged, the NYNJTC manages two LDTs, the Long Path and the Highlands Trail. These are publicly viewed as NYNJTC trails spanning the region served by the Trail Conference. NYNJTC has invested six decades in the Long Path (since 1960), and involvement in the Highlands Trail has been ongoing for almost three decades (since 1995).

Focusing strategic efforts on improving and ultimately completing LDTs, and promoting these trails to the hiking public, involves an emphasis on NYNJTC core competencies: Trail design and building, Trail and Ecological Stewardship, Land Conservation and Publications. The Trail Conference has the knowledge, experience, and funds (LASF) to expand LDT corridors, especially from small parcels, and well-established long-term relationships with landowners, public agencies, and non-profit conservation organizations. Protecting more land and then transferring these lands to other agencies provides the ongoing LASF replacement funding needed to expand conservation and trail stewardship activities through creation of trails that showcase the Mission of the NYNJTC. Intense organizational focus by all Program Areas (Trail Design, Building and Maintaining, Stewardship, Volunteer Management, communications, publications, financial) on these two evolving LDT trails will increase and leverage Trail Conference opportunities that support realizing the vision of completing potentially iconic Long Distance Trails.

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[4] Reflections: 100 Years of the New York-New Jersey Trail Conference.2021. New York-New Jersey Trail Conference. Mahwah, NJ.

3. INTEGRATE ECOLOGICAL & TRAIL STEWARDS INTO TRAIL MANAGEMENT & BUILDING

	Timeline	KPI
Collect internal data needed to complete Trail Plans and Guides for the Long Path and Highlands LDTs	Short Term: 2022-24	Documentation of existing conditions, suggestions for future projects, recommended improvements (including Green Corridors), land acquisition targets to guide planning and future volunteer work Percentage of LDT miles included in formal Trail Plans
Create Trail Plan for Long Path and Highlands LDTs	Medium Term: 2025 - Ongoing	Number of completed Trail Plans
Convert Long Path and Highlands GIS content for public Trail Guides	Medium Term: 2025-Ongoing	Number of GIS interactive maps, narrative descriptions of hiker, overnight/water resources, and interpretive materials to guide thru-hikers along LDTs Number of digital self-reported thru-hikers on HT and LP
Publish Long Path & Highlands Trail Guides	Long Term: 2026—27	Number of LDT Guides available online
Add LDT Volunteers and Trail Crews	Long Term: 2026—27	Number of LDT volunteer hours Number of volunteer LDT crews
Increase Long Path off road mileage Increase Long Path northern mileage Finalize Route of Highlands Trail in Putnam County	Long Term: 2026—27	Add 20 new off road trail miles Highlands Trail Map East of Hudson

User demands for NYNJTC expertise have greatly expanded since adoption of the 2017 Strategic Plan, significantly increased by Covid-driven demand for safe outdoor experiences. Land

managers are looking to the NYNJTC for services that go beyond just the building and maintenance of trails. As the number of trail users continues to grow and the regional climate changes, potentially becoming more extreme, environmentally sustainable trails and protection of natural habitats on public lands is rapidly becoming an urgent priority. The NYNJTC is uniquely positioned to address both these challenges through the Trail Stewards and the Ecological Stewardship Programs.

These two newest services were originally a small part of Trail Conference activities. However, both programs have grown significantly since their introduction. Fueled over the past five years by the NY State PRISM contract, Ecological Stewardship has supported Corps Crews, and fostered new partner collaborations through the PRISM subcontract program administered by the NYNJTC. Although constrained by this contract from using monies outside the Lower Hudson PRISM region, the addition of Volunteer-led crews, modeled on the Trail Maintenance volunteer structure, can expand the scope of ecologic stewardship into New Jersey and New York beyond invasive removal in the contract region. In addition, the Conservation Dogs Program is able to tackle non-invasive-species related projects (monitoring for rare and endangered native species and critical habitats) and is not restricted to New York State. This opens the possibility of expanding NYNJTC revegetation and habitat enhancement initiatives, which along with invasive removal, could greatly improve the trail user experience.

Trail Stewardship has evolved from a part time effort into a service much in demand by landowners who manage high traffic trails. These individuals interact with the trail user and are a "public face" of the Trail Conference mission. They are especially important in educating new and less experienced trail users.

It is apparent that integrating the activities of the three outreach programs (Trail Building, Trail Stewards, and Ecological Stewards) can enhance and leverage the efforts of each, and make the NYNJTC a stronger partner for regional efforts that enhance and protect public trail lands. Currently, these three programs are fairly autonomous, although small attempts at integration have been tested with coordinated assignments of some AmeriCorps volunteers. Actual integration of these multiple services, supported by Publications efforts, will be a significant new direction for NYNJTC, and requires communication and coordination between the various programs. Also needed will be some standardization of project criteria or standard operating

processes, which can evolve organically over the next five years. A first step in this direction is an organization restructuring that has placed Trail Stewards, Ecological Stewards, and the Conservation Dogs under one umbrella of the "Stewardship Department", headed by the Associate Director of Stewardship. This change will facilitate coordination of field work calendars and eliminate duplicate site visits that occurred previously.

Actions that support integration of the Stewards and Trail Builders and Maintainers include establishing joint Pilot Projects in Harriman State Park (a willing landowner) to evaluate activities that facilitate these three groups working jointly on trail projects. Information needed to develop cross training opportunities for new maintainers can be derived from these Pilot Projects. PRISM funding opportunities, awarded by NYNJTC, can also be communicated to Trail Builders, Maintainers, and NYNJTC partners to support identified Trail Conference strategic projects that meet PRISM criteria.

Strategic Action	Timeline	KPI
Increase integrated messaging into maps, books, other outreach and education materials	Short Term: 2023-Ongoing	Number of items containing holistic trail messaging
Cross Training of Trail & Ecological AmeriCorps Stewards	Short Term: 2022-23	Number of Stewards receiving this training
New Maintainers' Cross Training	Short Term: 2023	Develop appropriate Training Module Number of new Maintainers cross trained
Harriman "Full Service" Pilot Project	Medium Term: 2024-25	In collaboration with land manager, develop comprehensive integrated Pilot Project(s) for testing integration in Harriman State Park
Conduct Inventory & Assessment of Education & Outreach Offerings	Medium Term: 2024	Report containing an analysis of what communications we are producing, effectiveness of these efforts, gaps in current offerings, and recommendations to improve consistency among offerings.
Pilot & Maintain "Invasive-Free" or "Native Species" Trails	Long Term: 2025-27	Implement and evaluate results of Harriman Pilot Project(s) Number of integrated trail projects

4. *DEVELOP A NYNJTC ROADMAP FOR DECISION MAKING TO SUPPORT STRATEGIC OBJECTIVES*

The NYNJTC is now challenged by its own success, struggling to keep up with demands from land managers, partners, and the trail using public. Before the last decade of growth, a smaller volunteer organization with a smaller staff and limited focus faced fewer demands responded opportunistically to these requests. However, the NYNJTC is now a larger, more multifaceted organization, with increasing requests for its multiple areas of expertise. Currently, each program makes independent judgements of how time and effort can be best deployed. Some programs

have formal criteria for accepting new projects (Ecological Stewardship), while other areas may utilize an informal process (Trail Development). During the SOAR Workshops, it became apparent that Best Practices in one Program Area are not replicated, even when applicable, in other areas. Duplication of effort is occurring across Program Areas and all programs report being stretched beyond current capacity.

In order to maintain the high standards we aspire to, and to maximize everyone's best efforts, an internal process is needed that helps prioritize and align large organization-wide projects to create the largest benefits, greatest efficiencies, and leverage from our efforts. This is a process of determining whether a proposed project supports NYNJTC priorities, based on specific criteria that leverage and enhance NYNJTC time and effort, and meet the needs of all Program Areas. One organization-wide set of basic standards would allow rapid evaluation to determine whether a new project is a strong fit with the NYNJTC Mission, has long-term public benefits, and is achievable with the existing resources provided by NYNJTC. Should a beneficial project not be a good fit with NYNJTC criteria, there should be a standardized process for suggesting appropriate alternative options or partners.

Positive decision factors mentioned by the various Program Areas could include:

1) Trails/lands or connectors between lands already supported or maintained by NYNJTC
2) Locations where NYNJTC has major involvement with a land manager;
3) Permits obtained and funding in place to support materials and required staff time;
4) Initiatives having significant external volunteer and funding support;
5) Structures in place to sustain project accomplishments long term;
6) Strategically important objective and/or partner relationships.

Examples of negative factors mentioned could include:

1) Locations outside current NYNJTC project areas, without connectivity to existing trails or NYNJTC project areas;
2) Another entity already doing good work;
3) Requires scope of construction outside volunteer expertise;
4) Lack of experienced volunteer support or funding;
5) One-off situations that do not lead to or support a long-term relationship;
6) "Vanity" project funding that does not include required support staff time
7) Projects not NYNJTC related or mission aligned.

Creating critical organizational standards that all programs use would not preclude additional standards specific to each program, which may go beyond minimum organization-wide criteria.

 A powerful tool to consider is Lewin's Force Field Analysis (Fig. 7), a widely used management model that is a diagnostic process used in decision making[5]. The Force Field Analysis maps positive and negative factors related to a specific initiative, providing an easily understandable visual scoring method. A decision about taking on a new initiative can then be made based on the strength of the positive and negative factors, or highlight the steps needed to reduce a project's negative score. Use of a standardized evaluation tool could also be helpful when evaluating a project's potential for "mission creep" – moving beyond an organization's stated core mission, often due to financial inducements.
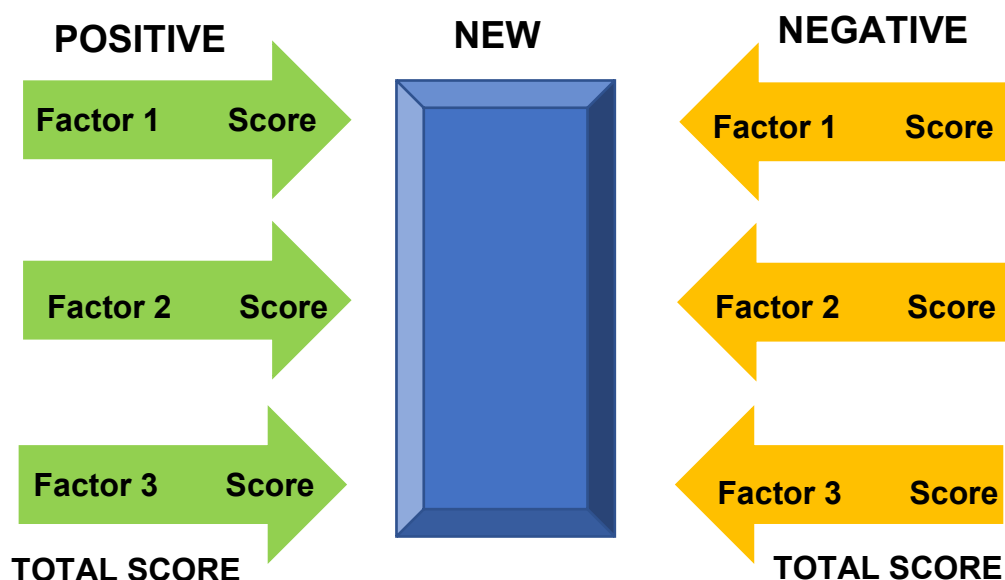

Figure 7. Schematic of Lewin's Force Field Analysis

Strategic Action	Timeline	KPI
Decision Roadmap Task Force established **Baseline DEI data for Board membership, staff, volunteers, clubs**	Short Term: 2022	Program Areas develop specific criteria recommendations Annual DEI Survey
Task Force evaluates recommendations and develops draft organization *Decision Roadmap* **criteria**	Medium Term: 2023	NYNJTC adoption of final organization minimum criteria for new initiatives
Beta testing of criteria	Medium Term: 2023-24	Revision(s) if needed
Implementation of *Decision Roadmap* **criteria by all Program Areas**	Long Term: 2024-27	Task Force recommended revisions of criteria as needed

5. *ACHIEVING FINANCIAL OPERATING SUSTAINABILITY*

The Board identified financial sustainability as an urgent priority in 2019 when the Financial Sustainability Task Force was initiated. This Task Force encouraged senior management to

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[5] Force Field Analysis | A Comprehensive Guide with Templates (creately.com)

reorganize the budgeting process and tighten expense controls in order to balance annual operating revenues and expenses. These controls resulted in positive net operating results in 2020-21 when revenues exceeded budget and expenses were below budget. In spite of Covid-19 challenges, the NYNJTC has now experienced two consecutive years of positive financial performance. Continuing to refine the ability to accurately project income, and match expenses to this projected income, is critical to maintaining financial sustainability.

There is also a need to obtain additional funding to enable the NYNJTC to achieve the multi-year Organizational Goals detailed in this Strategic Plan. We anticipate the most significant new expense will be related to supporting the Technology Strategy of improved IT infrastructure and capacity, IT support staff, and annual licensing fees for a commercial CRM. Funds may also be required to expand Stewardship activities beyond the lower Hudson Valley, currently funded by the restricted multi-year PRISM contract. The NYNJTC is also conducting an analysis of the current staff salary structure, which may need to be updated to retain outstanding staff and to attract a more diverse staff.

While continuing the focus on annual operating financial sustainability, in order to meet future needs strategies must be developed to increase annual revenues. A Development Plan that diversifies income sources and strengthens our philanthropic programs is needed. When an Advancement Director is in place by the end of 2022, the immediate focus should be on drafting a fundraising Strategic Plan that builds on the CSS campaign assessment and supports Strategic Plan goals.

Strategic Action	Timeline	KPI
Hire Advancement Director Complete Salary Review	Short Term: 2022-23	Advancement Director in place Board approved Compensation Plan
Formalize Development Plan Tracking Metrics Finalized	Medium Term: 2023	Completed 4 Year Development Plan integrated into Annual Operating Budgets & Strategic Plan Goals Quarterly Report to the Board
Income Diversification & Philanthropic Program Improvements	Long Term: 2024-27	Evaluation of Tracking Metrics as Measurements of Fundraising Success Funding secured for IT improvements Additional Fundraising Metrics as Technology upgrades allow

Diversity, Equity, and Inclusion (DEI)

In the 2021 SOAR Survey administered prior to the Strategic Planning Workshops, the identified NYNJTC *"Aspiration"* with the highest score was DEI (27 of 336 responses; 8%). However, relatively few specific actions the NYNJTC can take to increase diversity surfaced during the subsequent Workshops and meetings. While the general population (Fig. 8) and the hiking public on many trails in the NY-NJ metropolitan region are comparatively diverse, this diversity is reflected less so in the Board, staff, volunteer or club ranks of the NYNJTC.

Race & Ethnicity
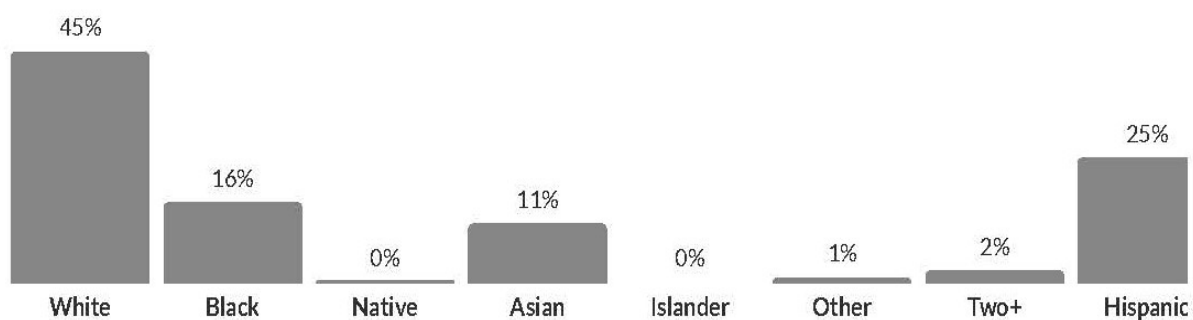
* Hispanic includes respondents of any race. Other categories are non-Hispanic.

Fig. 8. 2020 US Census data for the NY-NJ-PA metropolitan region.

However, the Trail Conference does not stand out as a DEI aberration within the hiking community[6]. A number of recent surveys from both trail groups and national parks[7] indicate that the majority of trail users are still predominately white[8]. However, there are numerous examples of changes in these historic trail user demographics, especially in urban areas[9], and in response to Covid pandemic restrictions. Many hiking and trail organizations are now actively taking steps to reach out to diverse communities[10].

The NYNJTC can aspire to be a leader in helping people of all demographic backgrounds feel welcome on trails by having volunteers, clubs, staff, and Board members that reflect the demographics of the NY - NJ metropolitan region. The NYNJTC Diversity, Equity and Inclusion Policy was approved on October 27, 2021 by the Trail Conference Board of Directors:

The Trail Conference believes that the joys of nature belong to everyone, regardless of race, ethnicity, gender, gender identity, age, disability, national origin, or religion. The Board is

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[6] Diversity in the Great Outdoors: Is Everyone Welcome in America's Parks and Public Lands? (resources.org)
[7] National Park Service Comprehensive Survey of the American Public: 2018 – Racial and Ethnic Diversity of National Park System Visitors and Non-Visitors (nps.gov)
[8] America's national parks face existential crisis over race - ABC News (go.com)
[9] Three City Parks that Encourage Inclusion in Their Communities | Urban Institute
[10] Diversity & Inclusion Resources | Partnership for the National Trails System (pnts.org)

committed to incorporating the values of diversity, equity, and inclusion (DEI) in the governance and operations of the Trail Conference by being nondiscriminatory and providing equal opportunities for employment, volunteering, and advancement. The Board recognizes and will attempt to address inequities and will dedicate time and effort to expanding greater diversity within the Board, staff, and volunteers; leading with respect and tolerance; and investigating underlying assumptions that interfere with the Trail Conference vision for DEI.

Reaching this goal will require thoughtful effort and changes in the way the Trail Conference attracts, recruits, and retains a diversity of individuals. Various strategies may be required to recruit a more representative Board, staff, Corps members, volunteers and clubs. The challenge over the next five years is to identify and implement strategies that can broaden current approaches that contribute to building a more representative organization.

Multiple Challenges Require Multiple Approaches

A first step is to acquire baseline data describing current diversity of various groups within the Trail Conference and to track this data annually to monitor progress, as well as the results of actions taken in response to trends in the data. Challenges each group faces will differ, and require different approaches:

1. Board Members
    a. The Board Nominating Committee has made progress in attracting diverse members. However, retention of these members has been inconsistent. Continuing to increase diversity of new Board members is ongoing, and issues related to retention and engagement need consideration.

2. Staff
    a. There is a need to reevaluate current recruitment practices and candidate sources to determine their effectiveness in bringing qualified diverse job candidates to the attention of those making hiring decisions for middle and senior management positions. If current approaches are deemed unsuccessful, an HR plan to address weaknesses should be developed to increase the diversity of candidates recruited.
    b. Because the AmeriCorps program serves as a pipeline for recruiting entry level staff, evaluating possible steps to increase the diversity of this program would be very helpful in creating a longer-term increase in staff diversity. Recruiting outreach to colleges that offer forestry or environmental degrees, such as Syracuse University, Rutgers University, Paul Smith College, SUNY in Morrisville, NY, Ramapo and Montclair State University in NJ, along with Community Colleges in the NY – NJ metropolitan region.
    c. Summer student internships could expose diverse candidates to the NYNJTC, prior to their making career or job decisions. Such a program could be targeted to

NY – NJ colleges with diverse student populations such as Rutgers Newark, ranked since 1997 as the most diverse national university in the United States[11].

3. Volunteers and Clubs
    a. There was strong acknowledgement at the Workshops and group meetings that the Trail Stewards are the "public face" of the NYNJTC. Increasing diversity of these individuals sends a message that the TC is a welcoming place for all. Increasing the ability of Trail Stewards to allow communication in multiple languages (bi-lingual Stewards, digital translation devices/programs, signage in multiple languages) would increase the ability to communicate with a large range of potential volunteers.
    b. Recruiting diverse volunteers could include determining where significant diverse populations hike, and placing compelling flyers seeking volunteers at trail head kiosks, have Trail Stewards provide recruiting handouts, or manning "recruiting" tables set up at trailheads. Possible locations could include AMC info centers at Reeves and the Palisades Interstate Park, Breakneck Ridge, and Anthony's Nose.
    c. Harriman is one of the most diverse environments in the NYNJTC region. Testing DEI volunteer opportunities in this location could provide data on approaches that are successful.
    d. The Trail Running community has already become a source of new member, donor, and Board diversity. These groups may be an untapped source of volunteer diversity to prioritize since they have a specific interest in maintaining/expanding trails.

Strategic Action	Timeline	KPI
Baseline DEI data	Short Term: 2022	Collect DEI data regarding diversity of Board, Staff, Volunteers, and Club components of the NYNJTC
DEI Annual Reporting	Short Term: 2022 – Ongoing	Annual reporting of DEI data and actions taken in response to DEI trends for Board, Staff, Volunteers, and Clubs
DEI Triggers	Medium Term: 2023 – Ongoing	Establish "Triggers" of little progress within the various Trail Conference constituencies leading to review and rethinking of DEI practices.

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[11] Diversity at Rutgers University-Newark | Rutgers University - Newark

Role of the Board

Strategic Planning is a Board responsibility. The Board Strategic Planning Committee (SPC) members were actively involved in the 18 months of meetings and discussions that developed this 2022 Strategic Plan. The SPC members are also involved volunteers participating in activities and actions highlighted in this plan. Having the SPC continue to partner with the Executive Director, key staff members, and volunteer leaders to focus on actions needed to achieve the KPIs would increase the Trail Conference's capacity to monitor and support progress. The committee is proposing that the SPC continue to track quarterly metrics, as well as participate in discussions with staff and volunteers related to Strategic objectives as part of the annual budget preparation process. Strengthening Board involvement in understanding the actions needed to achieve these goals will aid the Board in its Strategic Planning role. This partnership could potentially enhance Board knowledge of, and support for, actions the Trail Conference can take to achieve and exceed the 2022 Strategic Plan Goals.

APPENDICES

APPENDIX I. SOAR SURVEY ANALYSIS

APPENDIX I. SOAR Survey Analysis

	STRENGTHS	OPPORTUNITIES	ASPIRATIONS	RESULTS
Trail Programs	121	57	69	44
Trail Building, Maintenance, Construction (Trails)	43	2	16	5
Implementing Trail Plans/Assessments	3	7	6	2
Existing infrastructure/Sustainable trails	11	9	16	11
Scope/region/miles/vision of trails	16	1	4	7
Trail Steward Program	17	10	9	7
LNT	3	1	1	1
Maps/Publications/Signage	16	5	5	5
Long Distance Trails/Resources	0	1	1	0
Conservation/Land Preservation/Land Trusts	9	10	5	5
Advocacy/Climate Change/Policy	3	11	6	1
Ecological Stewardship	32	19	26	8
Recruitment	0	1	0	0
Environmental Protection/Habitat Restoration	1	3	13	3
Monitoring/Eradicating/Managing Invasives	13	6	3	3
Conservation Dogs	4	0	0	0
Education/Outreach/Stewardship	3	6	3	0
Scope/region/vision of Eco Stewardship Program	9	3	7	2
Service Engagement	158	30	64	70
Volunteer Recruitment	7	11	8	15
Volunteer Training & Onboarding	5	2	3	2
Volunteer Leadership/dedication/retention	10	0	3	25
Management/Communication/Coordination	25	0	5	2
Conservation Corps	14	1	5	3
Volunteer Work & Volunteer Relationships	47	0	5	6
Workshops/**Engagement/Education**/Opportunities	27	7	16	9
COVID - Digital engagement/information	9	6	3	1
Volunteer Recogniton/Dedication to	5	0	3	2
Volunteer Integration into Programs	0	1	3	1
Building communities of Service/inspire & enable volunteers	9	2	10	4
Advancement Team	23	57	70	69
Donor/Stakeholder Relationships	3	4	5	3
Funding/Fundraising/Increase in Funds	8	12	22	33
Culture of Philanthropy - Board/Staff/Volunteers	0	5	3	1
Communications/**Outreach**/Visibility/Social Media/B	9	17	30	15
Events/Activities/Outings/Socials	2	8	4	0
Grant/Contract Management & Income	1	4	5	6
Club Memberships/Memberships/Recruiting	0	7	1	11
Finance & Operations	18	2	9	22
Budget/fiscal sustainability/management of funds	12	2	9	22
COVID - Digital operations	6	0	0	0
Organizational	71	63	101	83
History/Legacy	12	1	0	0
Mission & Values (& Goals) Integration	11	5	5	14
Darlington Schoolhouse	3	0	0	0
Existing Projects/Work (general)/Protecting the Land	19	1	11	5
Improvements/Adaptability/Resiliency/Longevity	16	3	13	15
DEI	6	27	26	26
Better Technology/**Data** Management/Reporting/Admin	1	14	20	12
Recognition/Celebration of Org's accomplishments	3	12	25	11
STAFF	57	46	45	59
Workplace culture/Professionalism/Retention	7	2	5	11
Management tools/Staff training/Prof. Development	1	8	5	3
Re-org & New Leadership	9	0	0	0
Recruitment of Staff	0	4	1	1
Passionate/Dedicated/Inspiring/Ambitious Staff	13	0	4	3
Leadership/Reputation/Expertise/Professionalism	25	3	6	9
Limited Staff/Resources/Capacity/Expertise	0	19	8	13
Staff Compensation/Investment	0	3	5	9
Staff Collaboration/Staff Engagement across depts.	2	7	11	10
BOARD	1	5	2	0
Commitment/Leadership	1	1	0	0
Board/Staff Engagement	0	1	1	0
Outreach/Participation	0	2	1	0
Discusion of Goals for Board	0	1	0	0
PUBLIC/USERS/PARTNERS	39	87	47	38
COVID - Increase in outdoor activity/interest	2	21	2	0
Access/Connecting people/Public Transit/Refuge	15	14	25	3
Parks/Partner Relationships/Satisfaction	22	11	10	26
Reason: Lack of Funding for Parks	0	3	1	0
Youth Engagement	0	7	8	4
Local Partners/Agencies/Towns	0	4	0	1
Government/State/Elected Officials	0	8	0	1
Bank Partners	0	1	0	0
Universities/Colleges/Schools	0	4	0	0
Support Experts	0	3	0	0
Non-profits, like-minded	0	6	1	3
Corporate Sponsorships/Volunteers	0	3	0	0
Health Welness Sector	0	2	0	0
TOTAL COMMENTS:	520	366	433	393

APPENDIX II. Program Area Recommendations Supporting Organizational Goals

1. TECHNOLOGY STRATEGIES

Trail Technology Objectives

a. Create interactive GIS database capable of linking trail segments to assigned characteristics (mileage, features, maintainers, land owner/manager, other), supported by accurate data maintained by Trail Conference staff and volunteers.
    i.   Human Resource support required to:
        1.   Maintain database integrity and input data,
        2.   Train users, and
        3.   Produce GIS layers, maps, graphics.
    ii. Organizational support required to:
        1.   Provide funding

Stewardship Technology Objectives

a. **Single** database (geo referenced) needed for the entire organization – trail and stewardship data need to be aligned

Outreach & Education Technology Objectives

a. Potential development of E-Books, digital content online "store"
b. GIS capability available to all program areas
c. Development/use of QR codes

Service Engagement Objectives

a. *Beta test* online reporting successful – roll out scheduled for July 2022
    a. In the wake of the move to online reporting, which will remove significant administrative burdens from volunteer leaders, the Engagement Team should consider ways to encourage leaders to tackle new and traditionally under-utilized aspects of their leadership roles (roving trail crews, social events, etc).
b. Revamped Website – easier to navigate, recruitment
    a. Consider ways that existing infrastructure could support volunteer recruitment. For example, hikers who submit trail reports might get an automated message saying "*Thank you! We rely on people just like you to help respond to the issues you've reported. If you're interested in learning more about how you can help out and become a volunteer yourself, contact volunteer@nynjtc.org.*"

    c. Digital internal staff training & support

        a. Lots of excellent content has been created in recent years, but it can be better curated for easy future reference.

        b. Intake webinars

        c. Engagement Team has created a robust onboarding process for new volunteer leaders, but the process is time-intensive for staff and has potential to be inconsistent. Webinars can be used for "generic" onboarding, with active staff involvement restricted to location- or project-specific discussion.

        d. Investigating a possible intake system that would automate what the volunteer staff already does.

    d. Wifi at WTEC

        a. Currently the cost estimate is $100,000 to have a traditional wifi set up at the WTEC. While that currently is cost prohibitive, there may be other options to consider. Having technology accessible by corps members will continue to be more and more essential to their work.

    e. A robust hybrid technology model

        a. Most of our events (both volunteer/in person) in the past few years have been virtual and has led to a strong uptick in attendance. While facilities are opening up, we are lacking in ways to have meetings be in a hybrid model.

2. *EXISTING NYNJTC PROGRAMS – LONG DISTANCE TRAILS*

Trail LDT Objectives

    a. Complete individual NY-NJ Trail Conference Trail Plans for three iconic Long-Distance Trails (LDTs): Long Path, Highlands Trail, and Appalachian Trail.

        i. Trail Conference templates available (Long Path Contingency Plan, Tenafly Nature Center Trails Master Plan, Lake Superior Trails Plan) can be reformatted for use as LDT Trail Plan templates.

        ii. Current data/information and volunteer expertise provide enough information to document current LDT conditions, and establish specific measurable goals to be achieved within the next 5 years. This information can be compiled into Trail Plans for each LDT (short-term goal).

        iii. Existing GIS data forms a strong foundation to create contiguous Trail Conference maps for the length of each LDT, and the creation of such maps would be valuable to both the hiking public and Trail Conference volunteers/staff for planning purposes(medium-term goal).

b. Existing online and published guides can be supplemented by new maps and trail improvements to create formal Trail Conference guides to each LDT in the style of the existing Lenape Trail Guide (long-term goal).

c. Marketing LDTs to the general public via digital channels (website and digital links to website, PDF files, Avenza, other).

d. Other Potential Strategic Goals/Metrics could include:
    i. Specific parcels to be preserved,
    ii. Specific section or end point extensions,
    iii. New amenities (overnight facilities, other),
    iv. Identified partners for each LDT and partner roles (funding, building, outreach, other), and
    v. LDT Protection Plan(s).

Stewardship LDT Objectives

a. Consider green trail corridor enhancement of habitat connectivity for wildlife movement

Service Engagement

a. Build LDT volunteer capacity
b. Funded AmeriCorps members doing LDT Construction
c. Possibly have a crew that is solely dedicated to LDT initiatives, not just trail building/construction. The LDT crew can incorporate multiple crew initiatives.
d. Copyright Highlands Trail & Long Path
e. LDTs, more than local trails, rely on strong succession planning and institutional knowledge. Recognize that LDTs have strong identities and branding which makes it easy to build communities around them. We have seen this with the AT, and can apply those lessons to form robust LP and HT communities.

3. *INTEGRATE ECOLOGICAL STEWARDSHIP & TRAIL STEWARDS INTO TRAIL MANAGEMENT & BUILDING*

Trail Integration Objectives

a. Integrating Ecologic Stewardship/Sustainability with Trail Design and Building activities will be a significant new direction for the NY-NJ Trail Conference. Creation of the Trail Plan for Harriman offers a unique opportunity to propose pilot projects where disturbed area restoration can take place alongside traditional trail building improvements. There is a willing land manager who would support stewardship initiatives, and success at this location would potentially open up other trails in NY State to this trail design approach. Harriman's proximity to the

Darlington headquarters provides an opportunity for volunteers, staff, and Board members to experience firsthand effects of integrating trail building and stewardship functions. Need to develop metrics to evaluate success/failure of pilot projects

Stewardship Trail Integration Objectives

a. Ecological Healthy Trails
    i. Coordinate Trail & Ecologic Stewards Field Plans – calendar integration
    ii. Cross Train Stewards and Maintainers
b. Add Ecological input for trails TC is considering adopting and potential new major projects
c. Position PRISM Contract to support NYNJTC Strategic Goals
d. Increase volunteer led crews in both NY and NJ
e. Expand use of Conservation Dog for Native Threatened & Endangered species protections in NY and NJ

Outreach & Education Trail Integration Objectives

a. Expand communication with Trail Users
    i. Bilingual Stewards, Materials
    ii. Increase Signage
    iii. Utilize Bar Code potential links
    iv. Develop Integrated Comprehensive Prototype Kiosk
    v. Trail User Surveys

b. Cross Training Program Areas
    vi. Add Leave No Trace (LNT) training for all new Maintainers
    vii. Provide Corps & Ecological Stewards in LNT and Invasive cross trainings
    viii. Corps & Ecological Stewards go out together in field season
c. Increase integrated messaging into maps, books, other printed materials

Service Engagement Objectives

a. Consider multiple levels of Maintainer Courses: "Basic Maintainer" (minimum material) and "Super Maintainer" (higher level of content, cross training content – trail building, biology, Leave No Trace, other)
    ix. Crucial to offer new opportunities for deeper engagement without overwhelming new volunteers. Basic maintenance needs to have low barriers to entry, with interested maintainers having the opportunity to pursue more advanced learning if they choose it.
    x. These courses should be conceived and implemented in line with the vision for a standardized Trail Conference University curriculum.
b. Create a series of cross training Workshops available through Trail University (digital versions)

      xi. Consistent workshops with a sense of narrative and progression, including rewards for completion such as decals.
- c. Corps members can be more cross trained with increased intracrew interactions. When engaging new partners, discuss the metrics and emphasize the importance of a wholistic project.
- d. Special Projects – include Stewards

4. *NYNJTC DECISION ROADMAP SUPPORTING STRATEGIC GOALS*

Trail Decision Roadmap

- a. Positive aspects of proposed projects:
    - i. Trails/lands already supported or maintained by NYNJTC?
    - ii. Connectors between lands supported by NYNJTC?
    - iii. Existing volunteers and funds to support project?
    - iv. Structure in place to sustain project over the long term?
    - v. Important to support future NYNJTC strategic objectives?
- b. Negative aspects of proposed projects:
    - i. One off situations for NYNJTC,
    - ii. Extreme distance from current working areas, without connectivity to existing trails or parks,
    - iii. Lack of experienced volunteers and/or funding.
- c. Other Trail options could include:
    (OPTIONS THAT SUPPORT TC – Workshops, Trainings, Pay for Content, Other?)

Stewardship Decision Roadmap

- a. Brent shared current Ecology rubric
- b. Subcontract projects not TC related/mission aligned
- c. RESTORATION is a growth opportunity – currently do not have this expertise in house
- d. Assess long-term strategic fit with respect to the Aquatic Invasive program

Outreach & Education Decision Roadmap

- a. Knowing capacity needed and identifying where that capacity is available before accepting a project
- b. Requiring TC signage to be allowed
- c. GIS Capacity – Need for a GIS specialist available to work with all Program Areas

Service Engagement Decision Roadmap

- a. Desire to learn
- b. Ability to interact with others

xii. Having a "one size doesn't fit all" has been essential to our success. While some would prefer to interact with others, many see the solo nature of volunteering as desirable.

b. Negatives:

i. Partner already doing good work

Staff capacity limits

ii. Vanity project funding gifts that do not include staff time costs

When considering a new project, does it…

1. Improve trails maintained by the Trail Conference?
2. Benefit a park where we maintain trails?
3. Connect different parks where we maintain trails?
4. Have an existing body of volunteers ready to execute the project?
5. Have funding available to cover both materials and staff time?
6. Require a scope of construction beyond volunteers, such as a rail trail?
7. Impact the Trail Conference's DEI initiatives?

Potential challenges to our involvement include…

1. No expectation that the TC would adopt the final trail product.
2. Extreme distance from Trail Conference Headquarters in Mahwah.
3. Lack of connectivity to existing maintained trails or parks.
4. Expectation that Trail Conference will recruit and train new volunteers.
5. Lack of funding to cover staff time.
6. Impacting moral of corps crews, such being disconnected to others because of location/type of work.

5. *OTHER STRATEGIC IMPERATIVES*

Mission creep – role/structure of Aquatic PRISM initiatives
Member Clubs – importance/leverage/relationship within TC

At the bare minimum, do program staff have the ability to reach out to member clubs when needed for event promotion? Do we need anything beyond that, or is an accessible contact list enough?

Human Resources

Trails

a. Personnel to maintain organization-wide database integrity and input data
b. Training of GIS users
c. Produce GIS layers, maps, graphics.

Stewardship

    a. Videos for training an area of growth
    b. Need GIS staff person and single GIS system with layers accessible to the different program areas

Trails

    i. Cost of GIS license, software, technical capabilities,
    ii. Technology support funding – ongoing GIS technical position, potentially growing in scope.

Stewardship

    i. Cost of GIS staff, software, hardware
    ii. Identify and solicit restoration funding sources
    iii. Board budget approval moved to November to better tie in with PRISM-supported projects

Outreach & Education

    i. Cost of expanded signage/kiosk program
    ii. Cost of GIS software, equipment, personnel
    iii. Defining NYNJTC niche/role with respect to monetizing educational content and educating the public

APPENDIX III. Potential Program Area Strategic Goals

In developing organization-wide Strategic Objectives and KPIs, our goal was to focus attention on actions and measurements that were applicable across all Program Areas, that strengthened the NYNJTC overall future strategic position, and that were "trackable" under current technology constraints. However, in using this standard, we found a number of excellent suggestions that could benefit the organization were eliminated as 2022 Strategic Objectives. These items are included in this Appendix. We are recommending that they be considered by management as potential strategic objectives for an individual Program Area.

Financial Objectives

As a critical step in developing a clear and measurable fund-raising effort, we will build on the CSS Campaign assessment. This currently contemplates working with the Top Prospects list developed by the CCS consultants: 26 Tier 1 prospects (donated $5k or more in the last 5 years; have a gift capacity of $200k or less); 50 Tier 2 prospects (donated $1k or more in the last five years; have a gift capacity of $200k or more); and 214 Tier 3 prospects (donated less than $1k in the last five years; have a gift capacity of $300k or more).

An outreach plan for these 290 donors should include regular outreach, invitation to events, and updates directly from Josh or Advancement staff (depending on relationship & tier). Additional "easy lifts" that support fundraising include personal notes from Josh on acknowledgements to $500+ gifts and follow up with past (3+ years) planned giving donors – are they still including TC in their will? Can they be further engaged? Tracking these outreach efforts must include appropriate metrics (current number of donor meetings, asks made, other). Fundraising metrics may include:

- Average annual gift
- Number of asks made at every giving level
- Donor retention rate (at various giving levels)
- Total matching gift dollars YOY (include a line about it on all acknowledgement letters, online giving page, email signature line)
- Pledge fulfillment percentage
- Donor retention rate AND donor lifetime value
- Last Year But Not This Year and Some Year But Not This Year (LYBUNT's and SYBUNT')
- Planned giving bequests and dollars (while not immediately impactful, this is appropriate to track)

Not all of these may be possible to track given the NYNJTC's current technology and staffing levels; the Advancement team can identify 3-5 trackable metrics to begin to measure fundraising success.

Trail Objectives

1) LDT Strategic Goals/Metrics could include:
   a) Specific parcels to be preserved,
   b) Specific section or end point extensions,
   c) New amenities (overnight facilities, other),
   d) Identified partners for each LDT and partner roles (funding, building, outreach, other), and
   e) LDT Protection Plan(s).

Stewardship Objectives

   a) Add Ecological input for trails TC is considering adopting and potential new major projects,
   b) Expand use of Conservation Dog for Native Threatened & Endangered species protections in NY and NJ,
   c) Assess long-term strategic fit with respect to the Aquatic Invasive program and the NYNJTC mission.

Outreach & Education Objectives

   a) Development/use of QR codes, especially at high traffic Trail Heads
   b) Expand communication with Trail Users
      a. Bilingual Stewards, Materials
      b. Increase Signage
      c. Utilize Bar Code potential links
      d. Develop Integrated Comprehensive Prototype Kiosk
      e. Trail User Surveys
   c) Knowing capacity needed and identifying where that capacity is available before accepting a project
   d) Requiring TC signage to be allowed
   e) Member Clubs – importance/leverage/relationship within TC. At the bare minimum, do program staff have the ability to reach out to member clubs when needed for event promotion? Do we need anything beyond that, or is an accessible contact list enough?

Service Engagement Objectives

   a) Have a crew solely dedicated to LDT initiatives, including trail building/construction and stewardship. The LDT crew could incorporate multiple crew initiatives.
   b) LDTs rely on strong succession planning and institutional knowledge. Recognize that LDTs have strong identities and branding which makes it easy to build communities around them. We can apply AT lessons to form robust LP and HT communities.
   c) Funded AmeriCorps members doing LDT Construction

d) Online volunteer reporting will remove significant administrative burdens from volunteer leaders. Engagement Team should consider ways to encourage leaders to tackle new or under-utilized aspects of their leadership roles.

e) Excellent content has been created in recent years, but it can be better curated for easy future reference.

f) Wifi at WTEC: Currently the cost estimate is $100,000 to have a traditional wifi set up at the WTEC. While that is cost prohibitive, there may be other options to consider. Having accessible technology for Corps members will be more and more essential.

g) Consider multiple levels of Maintainer Courses: "Basic Maintainer" (minimum material) and "Super Maintainer" (higher level of content, cross training content – trail building, biology, Leave No Trace)

    a. Crucial to offer opportunities for deeper engagement without overwhelming volunteers. Basic maintenance needs low barriers to entry, while giving maintainers an opportunity to pursue more advanced learning if they choose.

    b. These courses should be conceived and implemented with the vision for a standardized Trail Conference University curriculum.

h) Create a series of cross training Workshops available through Trail University (digital versions)

i) Corps members can be cross trained with increased intra-crew interactions. When engaging new partners, discuss the metrics and emphasize the importance of a wholistic project.

j) Special Projects – include Stewards