

KEYSTONE TRAILS ASSOCIATION

**Strategic Plan
2006-2009**

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EXECUTIVE SUMMARY

This strategic plan is the product of a series of planning sessions held between December, 2005 and February, 2006 and represents the first effort of this kind in the history of Keystone Trails Association. These sessions were facilitated by a team of students, under faculty supervision, from the Nonprofit Clinic, Graduate School of Public and International Affairs, University of Pittsburgh. As background information to help guide the planning process, two documents were initially prepared by the Clinic. The first document was an Environmental Scan which consisted of a SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis of Keystone Trails Association (KTA). The second document was an Industry Analysis which focuses on the competition facing the association from other similar organizations throughout the United States. These two documents are included in the Appendices.

The plan includes a newly formulated mission statement and a vision statement, the latter of which is an articulated expression of the kind of environment relative to hiking which will be realized in the future if KTA is successful in achieving its mission through the implementation of this plan. In developing its strategic plan, KTA identified a number of strategic issues which were considered important to KTA's survival and future effectiveness. These issues fall into the following eight categories – staffing, board development, fund development, advocacy, public awareness, partnerships and collaborations, membership, and protection and maintenance of hiking trails. The plan further identifies eight goals which KTA will seek to achieve through a series of action strategies that the organization will implement over the course of the next three years. To this end, an implementation timetable is included in this plan.

In formulating this strategic plan, KTA recognizes the challenges it faces as it seeks both to further promote hiking as a recreational opportunity in the Commonwealth of Pennsylvania and in preserving the present hiking trails.

History

KEYSTONE TRAILS ASSOCIATION (KTA) is an alliance of organizations and individuals who share a common interest in hiking opportunities in Pennsylvania and neighboring states, as well as sharing a concern for the creation and conservation of existing trails. The association, founded in 1956, is an informal part of a large and growing infrastructure of organizations across the United States and Canada that seek to promote the enjoyment of trails and greenways that offer solace, health, fitness, and low impact outdoor recreational opportunities.

KTA plays a lead role in coordinating the activities of hiking clubs and other compatible outdoor groups in and around Pennsylvania. KTA was designated as Volunteer Conservation Organization of the Year in Pennsylvania in 1999. The organization also maintains an awareness of the actions of government - at all levels - that can have an impact on hiking or hiking trails. Through the quarterly newsletter and its website (www.kta-hike.org), members and hikers are kept informed about hiking-related activities.

The objectives of KTA as set forth in Article 2 of its bylaws are:

- Coordinate the efforts of walking and hiking groups in and around Pennsylvania;
- Develop, build, and maintain hiking trails, including trail support facilities;
- Protect hiking trail lands through support and advocacy, as well as by acquisition when desirable and feasible; and
- Educate the public in the responsible use of trails and the natural environment.

Background and Scope of Project: Plan Introduction

In the fall of 2005, KTA contracted with the Nonprofit Clinic of the Graduate School of Public and International Affairs, University of Pittsburgh, to provide technical assistance and help the organization develop a strategic plan – the first in the organization’s history. After reaching agreement with the leadership of the association about the scope of the strategic plan, the Nonprofit Clinic formed a technical assistance team consisting of two students and a supervising faculty member. Strategic planning is a process for helping an organization to achieve organizational effectiveness and in setting future directions. A strategic plan, however, should not be viewed as a step-by-step instruction book on how to “fix” the organization, but rather should be defined as a living document that provides a set of strategies that the organization can reasonably implement over a specified period of time to achieve greater effectiveness.

This planning process, though not explicitly stated, was framed in the context of the life cycle stages of nonprofit organizations. In the case of KTA, it is reasonable to suggest that the organization is between the *ground and grow* stage and the *produce and sustain* stage of development. Clearly, for example, KTA has a formal governance structure, has developed products and services, and has acquired some funding resources which are characteristics of the ground and grow stage. On the other hand, KTA has not yet secured the permanence of an executive director, developed a staff structure, or achieved stable financing which are characteristics of the produce and sustain stage. To a large extent, this strategic plan is designed to enable KTA to fully reach the critical produce and sustain stage of its development.

The initial process of developing this strategic plan involved the team conducting an Environmental Scan or SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis of the

organization and preparing an Industry Analysis – both of which are attached as Appendices. The purpose of the SWOT analysis is to provide information on the organization’s internal strengths and weaknesses in relation to the external opportunities and threats facing the organization. The SWOT analysis is an important step helping KTA identify appropriate and effective strategies to achieve the organization’s mission and goals. The purpose of the Industry Analysis is to identify other competing organizations that have a similar mission, and how this competition can affect the ability of KTA to attract funding resources, increase its membership, and attract volunteers.

The methodology employed in carrying out the strategic planning process included search of relevant documents about the organization of KTA, and a survey of the members of the KTA board of directors to ascertain what each member perceived the organization’s goals should be and what each member saw as the strategic issues facing the organization. In December, 2005, the Nonprofit Clinic conducted the first strategic planning session at a KTA board retreat to discuss the organization’s mission, vision, goals, and strategic issues, and to develop strategies for moving the organization forward. The second planning session was held in February, 2006. The Plan that follows represents the composite results of these two sessions.

Mission Statement

The Keystone Trails Association has not had a specific mission statement, although it has operated with an explicit purpose and a set of goals and objectives. The Nonprofit Clinic drafted the following mission statement, and after considerable discussion and fine-tuning, it was approved by the KTA board on December 10, 2005.

Keystone Trails Association, a volunteer-directed, public service organization, is a federation of membership organizations and individuals dedicated to providing, preserving, protecting and promoting recreational hiking trails and hiking

opportunities in Pennsylvania, and to representing and advocating the interests and concerns of the Pennsylvania hiking community.

Vision Statement

Consistent with KTA's objectives as set forth in its bylaws, and successfully pursuing its mission through the implementation of the strategies and actions in this strategic plan, the board envisions a future in which KTA will have:

- Contributed to ensuring that future generations will enjoy clean air and water, quiet and scenic vistas, wildlife, and opportunities for sustainable recreation and renewal along hiking trails
- Developed a solid and diverse program to ensure a balanced approach to the protection of hiking trails and promoted support and enhancement of local economies
- Contributed to the mentoring and recruitment of a new generation of hikers and helped to increase membership in state hiking clubs and organizations
- Become recognized by state agencies, hikers and the general public as Pennsylvania's leading volunteer organization for acquiring and protecting trail corridors and for designing, building and maintaining hiking trails
- Increased the public's awareness and appreciation of hiking as a healthy, low-impact and family oriented activity to experience the natural environment
- Become recognized for its ability to mobilize opinion and influence state and local government policy in support of hiking trails
- Established wide-ranging collaborations to accomplish the mission of the organization

Strategic Issues, Goals and Action Strategies

In order to achieve KTA's goals, implement its mission, and realize its future vision, the board of directors has identified eight categories of strategic issues that will affect its organizational sustainability, performance, and survival. Each strategic issue is phrased as a question and is followed by the goal that KTA seeks to realize relative to the strategic issues and a series of action strategies that KTA will implement not only to achieve the goals which have been identified, but also to help to achieve the organization's vision.

1. Strategic Issue – Staffing:

- a. How can KTA transition from an all volunteer organization to a volunteer organization with a professional manager who will ensure sustained performance?

Goal:

- a. To hire within two years an executive director, preferably to be based in Harrisburg, to move KTA towards its vision

Action Strategies:

- a. With board approval and appropriate funding in place, KTA will recruit and hire a full-time executive director
- b. As an option to the hiring of a full-time executive director, KTA will recruit and employ a volunteer executive director, to be followed in a year or so with a partially paid executive director, and then within a year or so a fully paid executive director
- c. As another option to the hiring of a full-time executive director, KTA will hire a qualified management firm to perform executive functions

2. Strategic Issue – Board Development:

- a. What policies/plans can be developed to ensure KTA's capability to carry out its responsibility for trail/land protection, trail management and public education?
- b. How can KTA develop a board which is competent to assume effective leadership to ensure mission attainment?

Goal:

- a. To strengthen the board of directors

Action Strategies:

- a. Send existing board of directors members to training/conferences related to the industry
- b. Grow the board by identifying in board recruitment individuals with expertise in accounting, law, public policy, club leadership experience, etc.
- c. Groom committee chairs for board membership through training
- d. Encourage all board members to serve on committees
- e. Hold periodic board leadership retreats to strengthen understanding of board member roles and responsibilities

3. Strategic Issue – Funding and Fundraising:

- a. How can KTA secure dependable and reliable funding source(s) to carry out its mission?
- b. Should KTA start an endowment fund?

Goal:

- a. To achieve resource stability through dues, bequests, grants, corporate and private donations, and state and federal funding.

Action Strategies:

- a. Establish a board committee to explore the feasibility of initiating an endowment campaign to ensure KTA's long term financial stability
- b. Retain the services of professional fundraising consultant to develop a plan to implement an annual appeal and direct a corporate sponsorship campaign
- c. Expand grant writing efforts directed toward attracting state and county "Growing Greener" funding and foundation grants
- d. Increase current membership annual dues
- e. Promote the increased sales of KTA publications

4. Strategic Issue – Advocacy:

- a. How does KTA influence public policy at highest levels of policy development in Pennsylvania, e.g., executive and legislative branches?

Goal:

- a. To establish an advocacy presence in Harrisburg on issues related to hiking trails, land protection, environmental issues, clean air, and noise pollution

Action Strategies:

- a. Engage in more proactive policy making relative to hiking trails at the highest level of policy development
- b. Mobilize membership and local clubs for more active involvement in policy advocacy
- c. Maintain a physical presence in Harrisburg to enable more timely response to issues of concern to KTA
- d. Write and define charge for conservation and advocacy committee for hiking trails
- e. Seek prospective board members who have knowledge and competence regarding advocacy and policy making

5. Strategic Issue – Public Awareness:

- a. How can KTA raise organizational image statewide?
- b. Does the name KTA affect the organization's image and if the name should be changed, how should this be accomplished?
- c. How can KTA promote more trail utilization throughout Pennsylvania?

Goal:

- a. To raise public awareness of KTA and the importance of hiking and hiking trails in Pennsylvania

Action Strategies:

- a. Create an ad hoc board committee to assess the pros and cons of changing the organization's name in order to better communicate KTA's mission with the Commonwealth of Pennsylvania

- b. Secure the services of a marketing and public relations expert to develop a more attractive website, prepare “newsworthy” public services announcements related to the organization’s programs and services, and develop regional brochures to encourage more localized participation in KTA hiking programs
- c. Develop and utilized better hiking trail signage with visible identification of KTA and its logo
- d. Organize a speakers bureau to disseminate information about KTA and to promote hiking a recreational opportunity, with special attention to Pennsylvania Hiking Week

6. Strategic Issue – Partnerships:

- a. How can KTA build stronger partnerships in order to promote hiking in the outdoor recreational community?

Goal:

- a. To cultivate partnerships and collaborations with other similar public and nonprofit organizations with compatible missions

Action Strategies:

- a. Develop potential list of partnerships and expand the diversity and types of partners, corporate and commercial, who support KTA’s mission
- b. Increase involvement of current KTA partners in organizational activities
- c. Actively promote “reduced fee” structure to build partnerships with college and high school students
- d. Identify other types of outdoor activities for partnerships

7. Strategic Issue – Membership:

- a. How can KTA increase volunteer hours from membership?
- b. What effective inducement can KTA utilize to attract leaders for the future?

Goal:

- a. To increase individual and organizational memberships and reclaim former members

Action Strategies:

- a. Develop an annual program to recognize KTA and local club volunteers for outstanding service to the hiking program in Pennsylvania
- b. Embark on an expanded effort to recruit young and retired persons as volunteers, with an appropriate training program to emphasize roles and responsibilities of volunteers
- c. Establish a board committee to explore the feasibility of developing a collaborative partnership with colleges and universities to help design service learning projects for students interested in hiking and outdoor recreation
- d. Develop a summer internship program to be managed and supervised by KTA executive director
- e. Redesign KTA membership application to provide opportunity for prospective members to indicate interest in volunteer activities

8. Strategic Issue – Hiking Trails:

- a. How can KTA protect hiking trails from development pressures?
- b. How should KTA work with trail-maintaining clubs, private land owners and adjacent governmental landowners to secure permanent protection for hiking trail corridors?
- c. How can KTA protect currently endangered hiking trails?

Goal:

- a. To develop and maintain an inventory of hiking trails in Pennsylvania relative to usage and condition of trails, and to develop a plan for how KTA can assist hiking trail clubs in their work of maintaining and protecting hiking trails

Action Strategies:

- a. Develop training seminars to strengthen local KTA clubs' ability and capacity to more effectively communicate with and negotiate with public officials and local planning authorities about hiking and the need to expand local hiking opportunities through the development of new hiking trails
- b. Secure the services of a legal expert to provide training in easement law, to help negotiate easements with property owners, and help facilitate corridor purchases
- c. Provide local clubs with material to enable them to engage in an active dialogue with realtors and developers on the value of integrating hiking trails into newly planned communities as marketing assets

- d. Establish a task force to develop, with the assistance of curriculum specialists, a teachable curriculum on hiking trail development, conservation and protection as part of an environment preservation effort
- e. Develop an on-going dialogue with state and local legislators on the need for increased planning and development of hiking trails and greenways as a part of state-wide and local planning
- f. Secure the services of an environmental expert to conduct a needs assessment of current hiking trails and their endangerment as continuing hiking resources

Timeline

Action Strategy:	Time Line:					
	July 2006	Dec. 2006	Jan. 2007	June 2007	July 2007	Dec. 2007
Staffing:						
With board approval and appropriate funding in place, KTA will recruit and hire a full-time executive director	→					
As an option to the hiring of a full-time executive director, KTA will hire a qualified management firm to perform executive functions						
Board:						
Send existing board of directors members to training/conferences related to the industry				→		
Grow board by identifying in board recruitment individuals with expertise in accounting, law, public policy, club leadership experience, etc.	→					
Groom committee chairs for board membership thru training				→		
Encourage all board members to serve on committees	→					
Hold periodic board leadership retreats to strengthen understanding of board member roles and responsibilities				→		
Funding/Fundraising:						
Expand grant writing efforts directed toward attracting state and county “Growing Greener” funding and foundation grants.	→					
Increase current membership annual dues	→					
Promote the increased sales of KTA publications	→					
Establish a board committee to explore the feasibility of initiating an endowment campaign to ensure KTA’s long term financial stability			→			
Retain the services of professional fundraising consultant to develop a plan to implement an annual appeal and direct a corporate sponsorship campaign	→					

	July 2006	Dec. 2006	Jan. 2007	June 2007	July 2007	Dec. 2007
Expand grant writing efforts directed toward attracting state and county “Growing Greener” funding and foundation grants			→			
Advocacy:						
Engage in more proactive policy making relative to hiking trails at the highest level of policy development			→			
Mobilize membership and local clubs for more active involvement in policy making			→			
Maintain a physical presence in Harrisburg to enable more timely response to issues of concern to KTA				→		
Write and define charge for conservation and advocacy committee for hiking trails			→			
Seek board member with competence regarding advocacy/policy	→					
Public Awareness:						
Create an <i>ad hoc</i> board committee to assess the pros and cons of changing the organization’s name in order to better communicate its identity with the Commonwealth of Pennsylvania	→					
Secure the services of a marketing and public relations expert to develop a more attractive website, prepare “newsworthy” public services announcements related to the organization’s programs and services, and develop regional brochures to encourage more localized participation in KTA hiking programs	→					
Develop and utilize better trail signage with visible identification of KTA and its logo					→	
Organize a speakers bureau to disseminate information about KTA and to promote hiking a recreational opportunity, with special attention to Pennsylvania Hiking Week					→	

	July 2006	Dec. 2006	Jan. 2007	June 2007	July 2007	Dec. 2007
Partnerships:						
Develop potential list of partnerships and expand the diversity and types of partners, corporate and commercial, who support KTA's mission						
Increase involvement of current KTA partners in organizational activities						
Actively promote "reduced fee" structure to build partnerships with college and high school students						
Identify other types of outdoor activities for partnerships						
Membership:						
Develop an annual program to recognize KTA and local club volunteers for outstanding service to the hiking program in Pennsylvania	→					
Embark on an expanded effort to recruit young and retired persons as volunteers, with an appropriate training program to emphasize roles and responsibilities of volunteers			→			
Establish a board committee to explore the feasibility of developing a collaborative partnership with colleges and universities to help design service learning projects for students interested in hiking and outdoor recreation			→			
Develop a summer internship program to be managed and supervised by KTA executive director			→			
Redesign KTA membership application to provide opportunity for prospective members to indicate interest in volunteer activities	→					
Endangered Hiking Trails:						
Secure the services of a legal expert to provide training in easement law, to help negotiate easements with property owners, and help facilitate corridor purchases			→			
Engage in an active dialogue with realtors and developers on the value of integrating trails into newly planned communities as marketing assets					→	
Establish a board committee to develop, with the assistance of curriculum specialists, a teachable curriculum on trail development, conservation and protection as part of an environment preservation effort					→	

	July 2006	Dec. 2006	Jan. 2007	June 2007	July 2007	Dec. 2007
Engage in discussions with state and local legislators on the need for increased planning and development of hiking trails and greenways as a part of general land-use planning						
Secure the services of an environmental expert to conduct a needs assessment of current trails and their endangerment as continuing hiking resources						

Plan Summary and Recommendations

This strategic plan represents an important and timely undertaking by the Keystone Trails Association. It identifies an ambitious set of actions that the organization will seek to implement over the next three years which, if achieved, could well position the organization to become one of the best and most effective organizations of its kind in the country. However, as with all strategic plans, it may be necessary to modify or change some of the proposed strategies to accommodate unforeseeable changes in the organization's internal and external environment. Doing so will enable KTA to keep its strategic plan responsive to changing needs and circumstances.

The organization is fortunate in having a very knowledgeable board of directors who are committed to the organization and to promoting hiking in the Commonwealth of Pennsylvania. Recognizing this strength and from its own perspective on the strategic issues facing KTA, the Nonprofit Clinic offers the following recommendations for consideration as KTA begins to implement its strategic plan:

- To maximize the probabilities of successful plan implementation, move aggressively in hiring an executive director
- Recognize the critical importance of promoting hiking among the younger generation as an important and healthy recreational opportunity
- Embark on a search for "best practices" relative to membership development, recruitment of volunteers, marketing, financing, and other areas which have been used successfully by other hiking associations in the United States to achieve positive outcomes
- Periodically, engage in an assessment of the extent to which the organization has actually implemented its identified strategies
- Engage the services of a consultant to develop a systematic program evaluation system focused on outcomes and relevant indicator for measuring outcomes
- Wherever and whenever possible, connect environmental sustainability and hiking trail development and maintenance to the broader set of conservation and preservation issues

- To take advantage of some current research on organizational performance, acquire copies of the recently published document *From Adequate to Outstanding Performance* (The Forbes Funds) and distribute them to the board for future discussion
- Develop a set of performance measures to assess organizational effectiveness across several program and activity domains

APPENDIX I--Environmental Scan

The project team conducted an analysis of the Keystone Trail Association (KTA) to identify opportunities and threats in the internal and external environment and to identify strengths and weaknesses in the organization's environment. The environmental scan identified certain features, trends, developments in the environment of KTA that require attention by the organization as it moves forward in its strategic planning. By definition, opportunities and threats are more about the future, while strengths and weaknesses are about the present. Experts note that attention to opportunities and threats can be useful identifying an organization's "key success factors," or more directly, those activities that an organization must undertake to be successful in relating to its external environment.

Below are the major observations generated from the environmental scan:

Internal Environment

Strengths

1. Large membership (50 organizations and 1000 individuals)
2. 50-year existence proves the organization has successfully filled a need in the hiking trail/trail preservation market
3. Development of a formal board structure and a commitment to engage in a strategic planning initiative
4. Broad recognition of the organization's expertise in trail construction and maintenance
5. Expertise in publishing hiking publications/maps

Weaknesses

1. Lack of an executive director to provide leadership in some crucial organizational matters such as fundraising, volunteer-recruiting, grant writing, and overall organizational development
2. Poor utilization of technology to advance KTA's work and mission, such as an outdated website, lack of e-newsletters, online membership application, email hiking alerts, meeting announcements, advocacy initiatives (call to action email alerts), etc.

3. Lack of an organized advocacy program to advance the policy interests of KTA and its members in key public policy making centers such as Harrisburg and Washington, D.C.
4. Lack of mission/goals or definition for KTA's internal committees
5. Lack of measurable organizational performance information
6. Lack of an overall strategic plan to provide short term and long term direction for KTA

External Environment

Opportunities

1. Potential to engage in partnerships or collaborations with a national hiking trails preservation associations such as the American Hiking Society in order to broaden membership, collaborate on identifying and approaching potential funding sources and to combine advocacy efforts
2. Capitalizing on the growth in the fitness/healthy living movement in the U.S. and the potential to expand membership of this growing segment of the population, particularly the youth
3. Large statewide membership that can be mobilized to advocate on policy issues important to helping KTA achieve its overall mission
4. Increased funding for environmental and health-related activities from state and federal grants
5. Utilization of current publications to broadly market KTA throughout the Commonwealth and broaden its support in the general public and among future potential stakeholders

Threats

1. Limited funding sources (dues structure outdated, lack of grant applications delivered, no fundraising events)
2. The presence of other similar organizations and recreational interests (ATV, mountain bike, etc.) competing for use of trails and funding from the Pennsylvania Department of Natural Resources for such programs
3. Potential membership opposition to the idea of formalizing the organization such as the hiring of an executive director and other organizational changes

APPENDIX II—Industry Analysis

Introduction

An industry analysis is a vital component of a strategic plan. As such, the project team performed an industry analysis for the Keystone Trails Association (KTA) by researching and analyzing the status of the sector in which KTA operates. The following is the result of the analysis.

Analysis

KTA within the Outdoor Recreation Sector:

The Keystone Trails Association (KTA) is a 50-year old nonprofit alliance of 50 organizations and 1000 individuals. It seeks to advance hiking and related opportunities in Pennsylvania and neighboring states. KTA coordinates the activities of hiking clubs and other outdoor groups as well as monitors government actions that may potentially impact hiking or hiking trails. KTA exists as a part of an “industry” that includes other organizations involved in outdoor recreational activities. As will be noted later, this is a complex environment and industry sector.

In order for KTA to flourish and sustain itself in the competitive environment of outdoor recreation and trail usage, KTA needs to set itself apart from its competitors, or find its “organizational niche.” KTA must increase its organizational capacity to serve as the voice for supporters of hiking trails in Pennsylvania. It must communicate a message about the need to preserve and protect hiking trails in Pennsylvania. KTA must portray hiking trail preservation and maintenance as a compelling problem and unmet need. This unmet need regarding the preservation and maintenance of hiking trails should warrant funding and other support by government agencies. KTA would provide the most response to this challenge and demonstrate

its claim for funding by developing and utilizing performance measures to assess the effectiveness of what KTA does.

Within Pennsylvania there are more than three thousand miles of hiking trails. Most of these hiking trails are on public lands that are rich in history and natural resources. The protection and preservation of these hiking trails depend on the availability of the necessary financial resources. Yet, securing the necessary funding is a challenge – one that will likely continue to grow.

Financial Resources:

KTA's budget for fiscal year 2005-2006 is \$102,175. Revenues come from individual and organization membership dues, publication sales, and donations. There are many levels of membership:

- Individual membership (one year) - \$15
- Life membership (one time payment) - \$375
- Brush Cutters (one year) - \$20
- Blaze Painters (one year) - \$30
- Trail Builders (one year) - \$50
- Organization/club membership (one year) - \$25
- Youth membership (one year) - \$5
- Youth organizations - \$10 (one year) or \$25 (three years)

These dues are necessary to support the operations of KTA. The dues structure should be evaluated since dues have not been adjusted in several years to reflect rising costs of inflation. Therefore, in order to remain efficient and effective in its endeavors, KTA should assess its dues structure in light of its future activities.

Wholesale and retail sales of publications, such as hiking guides and maps, are another lucrative component of KTA's revenue stream. Income from sales of publications is approximately one-third of KTA's revenues, and it has the potential to increase. Increasing its

publications sales represents another activity of KTA that should be evaluated to see if changes in publication costs, and increase in other sale outlets may yield additional profits.

In fifty years of existence, KTA has received grant money only from the Pennsylvania Department of Conservation and Natural Resources (DCNR), a government funding agency. For 2005-2006, the DCNR's operational budget of \$93 million has been reduced by slightly more than 4 %, or \$4 million. Although the DCNR estimates it will have the same amount of money available this year for grant funds for recreation and conservation initiatives, KTA will need to monitor available funding resources through DCNR and aggressively pursue grant submissions and become more creative in developing its grant proposals.

Hiking Industry

The hiking industry continues to be one of the most popular outdoor activities in the United States according to the leading source of data on outdoor recreation activities. In 2004, hiking was the third most popular outdoor activity in the United States with 75.3 million participants; paved road bicycling (79.1 million) and fishing/non-fly (76.6 million) were slightly more popular than hiking. The Outdoor Industry Foundation (OIF) is a non-profit foundation established by the Outdoor Industry Association to encourage active outdoor recreation for all Americans. Each year, the OIF conducts an annual Outdoor Industry Foundation Participation Study to track nationwide participation levels for in human powered outdoor activities and provide independent quantitative research to help the outdoor industry and its constituents understand trends in participation levels, demographics and levels of commitment to human powered outdoor activities over time. *2004 Outdoor Recreation Participation Study, Trend Analysis for the United States, Seventh Edition*. June 2005. Outdoor Industry Foundation. 3 Feb 2006 <http://www.outdoorindustry.org/pdf/2005_Participation_Study.pdf>

Who is hiking? Participation is evenly distributed among men and women, age groups, and affluence levels. Where is hiking participation the highest? Participation is highest in the western United States, but the rate of participation in the northeast by “enthusiasts” or those who are the most frequent participants was similar to that of the rest of the country.

What else are hikers doing? Hiking has one of the highest rates of crossover participation in other outdoor activities. Hikers engage in other related activities such as all forms of bicycling (paved road, single track and dirt road), car camping, trail running, and fishing (both non-fly and fly-fishing). For the 13 other outdoor activities measured by the study, hiking is ranked high as a crossover activity.

As a result of such interest, it is not surprising that hiking and outdoor recreation has become a booming business. The Outdoor Industry Association has found that for the past five years, outdoor industry based businesses have continuously out performed the S&P 500. “Sales of outdoor gear, clothing, footwear, and other accessories for 2001 amounted to more than \$18 billion. Manufacturers’ shipments of hiking boots in the United States totaled over \$413 million, and the shipments of backpacks totaled over \$77 million.” *The Economic Benefits of Trails: Fact Sheet*. February 2004. American Hiking Society. 3 February 2006.

http://www.americanhiking.org/news/pdfs/econ_ben.pdf

A closer look at what is driving the expansion of this industry can be found in a yearly study provided to members of the Outdoor Industry Association. The report on the outdoor industry states that "Outdoor recreation occupies an enviable position at a unique time in our nation's history, and it offers a solution to the pressing problems of obesity and inactivity, Americans are increasingly drawn to the active outdoor lifestyle, and the industry is beginning to receive recognition as a major contributor to America's economic vitality." *2006 State of*

the Industry Report: Evolving Outdoor Industry is Healthy, Defined by Potential: Press Release.

Boulder, CO, January 28, 2006. Outdoor Industry Association (OIA), 3 February 2006

[http://www.outdoorindustry.org/press.oia.php?news_id=1685&sort_year=2006.](http://www.outdoorindustry.org/press.oia.php?news_id=1685&sort_year=2006)

Attached to this industry analysis is the section of the OIF study that focuses upon hiking. KTA will find this study helpful for analyzing future trends and creating strategies to strengthen the organization and increase its membership and support. Hiking is one of the most popular outdoor activities in this country and participation has remained strong. However, KTA is experiencing declining membership. The underlying reasoning for the decline in membership may not be obvious and it may not be simple to reverse; however, the OIF study should aid KTA in its efforts to strengthen the organization

Industry Competitors

In Pennsylvania, KTA is a part of network of other organizations seeking to promote and utilize the outdoor trails of Pennsylvania. These competing organizations represent a constant challenge to KTA. Some of these organizations compete against KTA for government funding that is dedicated to outdoor recreation and other organizations support activities that threaten the preservation and protection of hiking trails.

KTA's competitors include all-terrain vehicle (ATV) associations, snowmobile associations, horse associations, and mountain bike associations. For example, the ATV Association is a national organization that is dedicated to supporting ATV riders, racers, and owners. The Pennsylvania State Snowmobile Association is dedicated to promoting the proper recreational uses of snowmobiles while maintaining high quality trails throughout the state. Similarly, the various horse associations and mountain bike associations have worthwhile missions that also "utilize" hiking trails in Pennsylvania and surrounding geographic locations.

All of these organizations compete against KTA not only to gain access to trails, but also in seeking to attract and solidify their monetary support. In order for KTA sustain itself in a competitive environment, it may need to set itself apart from its competitors and find its “organizational niche.” On the other hand, KTA should consider if some of its competitors may become potential partners. As the crossover trends in the Outdoor Industry Foundation study shows, many people who enjoy outdoor activity participate in more than one outdoor activity.

KTA’s voice and record of accomplishments needs to be heard in Harrisburg, Pennsylvania and in Washington, DC, as government officials at both levels should be regarded as KTA constituencies. If KTA is to move forward with its organizational goals, then it must increase its visibility with state and national governments. By raising its visibility and serving as the voice of hikers in Pennsylvania, KTA may be able to increase its funding and other support from government agencies.

Recommendations

Based upon this industry analysis, the project team suggests the following:

1. Demonstrate that the Keystone Trails Association is the *primary* voice of hiking in Pennsylvania, that there are many hikers who utilize the trails, and that what KTA does is the most effective solution to the problems of trails preservation and maintenance
2. Develop the message that there is an unmet need regarding the preservation and maintenance of hiking trails in Pennsylvania and this compelling problem warrants support and funding by the state and federal governments
3. Develop more financial and human capital resources by increasing KTA’s membership and by generating additional money through the fees from new

members and by updating KTA fee and sales structure, such as dues, publication sales, and by increasing government and private sources support

4. In order to flourish and sustain itself in the competitive environment of outdoor recreation, KTA needs to set itself apart from its competitors; a process which is commonly called finding its “organizational niche”, and consider partnerships with competitors that share common interests and will work with KTA to achieve mutually beneficial goals

This industry analysis is a composite summary of information about KTA and the hiking and the outdoor recreation industry. It is also an assessment of the future of hiking and the potential for future support for hiking trails from the key constituents of KTA such as hikers, government agencies and private organizations. If it is to serve its intended purpose, this industry analysis should assist the board of directors of the Keystone Trails Association in assessing the environment in which the organization operates, identifying its competition, and thereby help KTA to determine the best strategies to meet the challenges of its competitors, while at the same time helping to strengthen the organization as it seeks to move from being a good organization to becoming an outstanding one

