

Case Study: Designing and Facilitating a Strategic Planning Process for the Appalachian Trail Conservancy, including the National Park Service and the 31 Volunteer Groups that maintain the Trail

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Context: Begun in 1925, the historic Appalachian Trail (AT) was developed by volunteers, and opened as a continuous trail in 1937. It was designated as the first National Scenic Trail by the National Trails System Act of 1968 and its 2100+ mile length makes it one of the longest continuous foot paths in the world, extending from Georgia to Maine. The AT is managed and maintained through a collaboration of an elected Board of Managers, the AT Park Office (part of the Nat'l Park Service), the 30+ person Appalachian Trail Conservancy (ATC) Staff and 31 volunteer trail-maintaining clubs located along its length. Annually, more than 4,000 volunteers contribute over 200,000 hours of effort on the AT.

The Challenge: The ATC and ATPO had engaged in limited strategic planning, mostly within committees. As a result of these efforts, some progress had been made in meeting the challenges of external factors impacting the Trail, building a relationship with ATPO, influencing and coalescing the volunteer work of 31 clubs, even in the midst of difficult economic times that had necessitated salary freezes, staff cuts and program reductions

However, the combination of challenges inherent in managing, maintaining and preserving the trail, including the constant growth and change of surrounding communities, increased number of hikers and other less compatible users (e.g. ATVs, cell towers), evolving environmental concerns and ever increasing cost, was made more difficult as a result of the disparate views, goals and values of its diverse stakeholders. Creating agreement regarding management strategies and priorities had become nearly impossible.

What We Did: We began by meeting with representatives from the Board, staff and ATPO to understand the challenges and clarify objectives, then worked with them to identify members who would serve as a Steering Committee that would work with us to design a process. Together, we generated a plan that included:

- Gathering and analyzing information about stakeholder views via survey and interview
- Designing a 'summit' that would bring together representatives of all stakeholder groups to
 - Identify and agree on a Vision for the trail and its management in the future
 - Fully understand the current challenges, threats and opportunities
 - Generate possible strategies for moving toward the Vision
 - Agree on the highest priorities and strategies to be adopted

We designed a three-day 'Summit', held in a beautiful rustic Department of Interior facility in Shepherdstown, W. VA. that was attended by 150 people representing all of the trail-maintaining clubs, ATC Staff and Board and the US ATPO, including Directors. Facilitated by us (and a small army of data runners/crunchers), the Summit provided opportunities for all in attendance to participate in discussions regarding the future of the trail. Specifically, they:

- Shared their own stories of what drew them to the trail
- Learned the current state of the trail and challenges of trail management
- Explored issues related to the relationship between clubs, government, land managers and staff
- Identified specific issues and problems that needed to be addressed & resolved
- Generated and rank ordered suggestions for management priorities going forward

Outcomes: After acknowledging and discussing the tensions and differing points of view across the parts of the organization, those present were able to generate a shared vision for the future of the Appalachian Trail itself. In addition, they were able to agree on specific strategies and actions to be taken and how these would be prioritized. These include a newly unified commitment to:

- Increasing protection of the trail
- Developing new sources of funding for programs that enhance the hiking experience
- Improving working relationships among the clubs, the ATC staff and agency partners

"Those may seem like obvious priorities,.....but it was important for a group of people representing all the partners to work through this process together", ATC Chairman of the Board and Executive Director