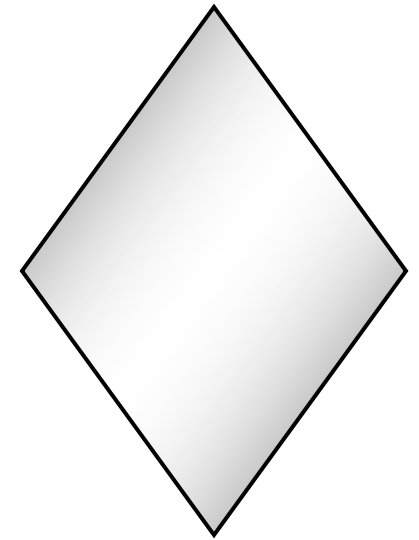

2004-05 Action Plan



Benton MacKaye
Trail Association

FINAL REPORT – November 6, 2004

2004-05 Action Plan

The 2004-05 Action Plan is the direct result of the hard work put in by participants to the BMTA Board of Directors' Retreat held on September 25, 2004.

BMTA Retreat Participants:

Steve Cartwright
Walt Cook
Linda Davis
Dick Evans
Ken Jones
Tom Keene
Margaret Meadows
Tony Oldfield
George Owen
Carole Perry
Debbie Tuten

Additional material, comments, suggestions and support from:

David Blount
Marty Dominy
Darcy Douglas
Jack Dowling
Margaret Drummond
Bill Porter
Bill Ristom

Report compiled by Bill Ross.

Table of Contents

■	Introduction	1
■	Current Conditions	1
	Membership Statistics	1
	Financial Statistics	1
■	The Directors' Retreat	1
	The Process	1
	The Results	1
■	Appendix – Action Plan	1

■ Introduction

On September 25, 2004, members of the Benton MacKaye Trail Association Board of Directors participated in a day-long retreat in order to create and adopt an action plan for the organization. This retreat was held in response to several issues:

- the need for increased membership to maintain the sections of trail being opened in Tennessee and North Carolina, including those in the Great Smoky Mountains National Park;
- the need for increased membership as a financial resource;
- the understanding that a coordination of Board actions can be more efficient;
- the upcoming 25th anniversary year; and,
- a recognition that some items on the Board of Directors' agenda could be part of a larger plan of action.

At the Retreat the participants reviewed the current membership and financial conditions of the organization before beginning to develop a coordinated plan for achieving their goals. This report follows the same sequence of decision making as the Retreat itself. The printed material provided at the retreat appears in the "current conditions" section of this report. The process of goal-setting and action item creation is covered in the section that follows. The final product of the Retreat, presented as an Action Plan, is shown in the Appendix.

The Action Plan is made up of specific action items, each with a responsible party identified, any coordinating parties listed, and a time frame for the action. This Action Plan, in conjunction with the routine tasks already performed by the organization, will guide BMTA activities over the next year to two years.



■ Current Conditions

Before beginning to identify goals of the organization it is useful to review the current conditions. In fact, without recognizing and understanding the current conditions, it can be difficult to reach a consensus on goals. By reviewing statistics on the current conditions all the participants will be on the same page. At the Retreat, participants received a handout that included the material reproduced here on membership and financial conditions. Not provided in printed form, but discussed in conjunction with this material, was the following:

- The creation and opening of the trail route from the Ocoee River to the Great Smoky Mountains National Park (GSMNP) is the primary focus of the organization. Completion of this portion of the trail will require workers today and maintainers over the long run.
- The opening of the trail route through the GSMNP is pending, and will increase the need for maintainers.

Membership Statistics

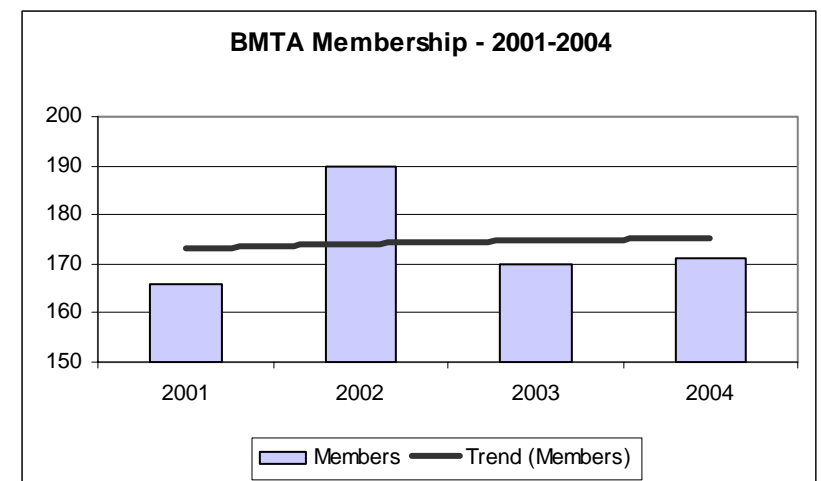
BMTA membership has remained relatively stable over the past four years. The table at right presents membership totals by year for the period of 2001 to 2004. (Note that all 2004 statistics are taken from the annual Membership Roster; members added since publication of the Roster are not reflected in these totals.) The graph “BMTA Membership 2001-2004” presents the same information as the table, but also provides a trend line of membership totals. Other than the larger-than-average total for 2002, there is not a great deal of variation between the years. The trend line reveals a slight increase in membership over the four year period.¹

These figures are important in that the membership totals shown here can be considered to provide the workforce for both maintaining the current trail route (Springer Mtn. to the Ocoee River) and carrying out the other programs of the organization (public outreach, annual events). If the perception is that the current membership total is adequate to carry out these functions, then the question should be asked whether

Total Membership 2001 - 2004

Year	Members
2001	166
2002	190
2003	170
2004	171

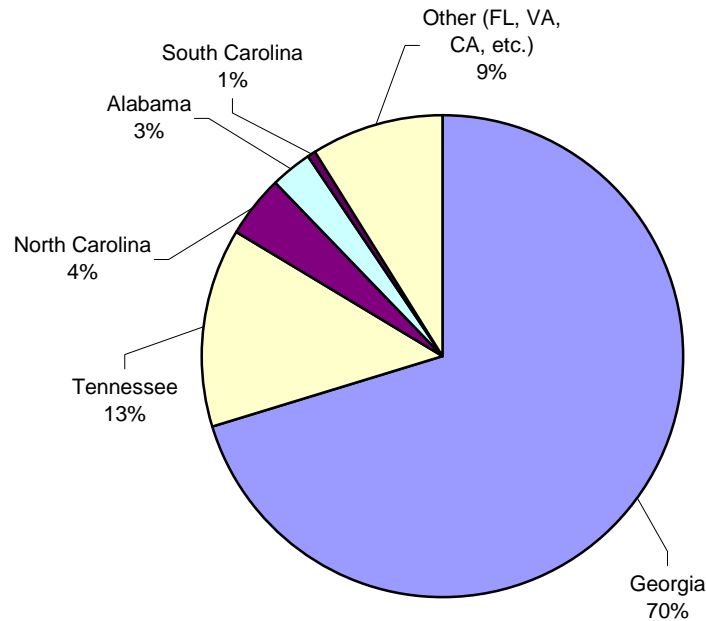
Source: Annual reports;
2004 membership roster.



¹ All trendlines presented in this report are based on linear regressions, rather than straight-line projections.

the current membership should also be expected to maintain the new trail sections being opened.

One thing to consider about using the current members to maintain an increasing trail route is simple geography. Is it convenient or practical for the current membership to attend work trips or adopt sections for maintenance along the newer portion of the route? The table to the right presents the 2004 membership total broken down by state of residence; this information is also presented in the pie chart. As can be seen, 70% of the current membership resides in Georgia. Tennessee membership is second, North Carolina third (note that in total numbers North Carolina has only two more members than Alabama).



Membership Totals - 2004

**Membership Totals
2004 by State of Residence**

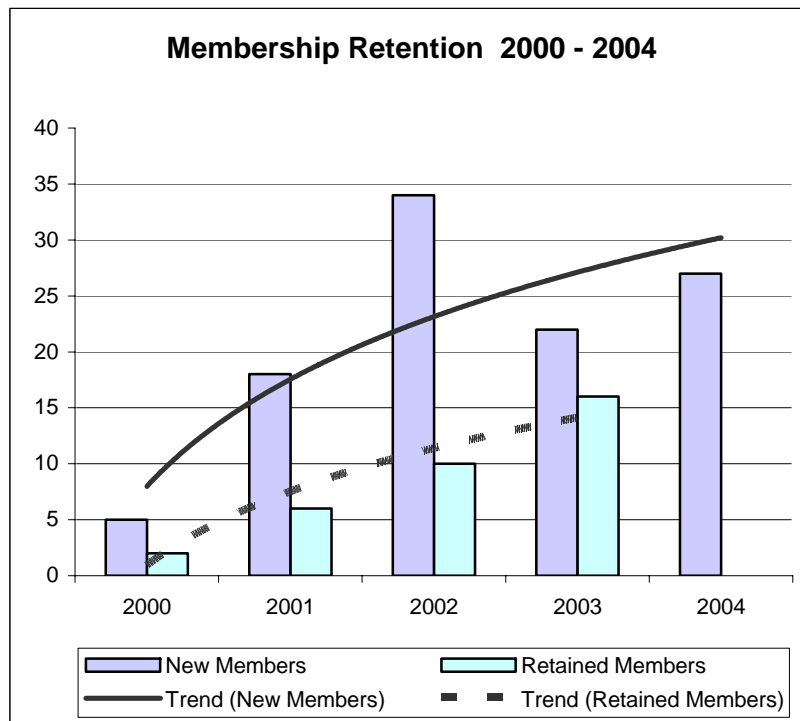
State	Members
Georgia	120
Tennessee	23
North Carolina	7
Alabama	5
South Carolina	1
Other (FL, VA, CA, etc.)	15
Total	171

Source: BMTA 2004 Membership Roster

One conclusion we can draw from this geographic information is that while the majority of the current membership is situated in an area convenient for trail work in North Georgia and Southeast Tennessee, as the trail route is completed eastward

to and through the Smokies it will be less practical to expect that the current membership could reasonably be expected to perform the required trail maintenance functions.

One last area of membership statistics was examined, that of membership retention. Without interpreting the figures in an attempt to read intentions in the renewal statistics we can still glean important information from an examination of the information. In the following table and graph, data on the retention of new members for the period of 2000 to 2003 is presented. Two pieces of information are presented: new members in a given year and number of those new members who renewed the following year. For example, of the five new members who joined in 2000, two renewed the next year. As can be seen the numbers involved are small, resulting in a wide variation in the “percent retained” figure. It is the trend lines in the graph that provide us with the most useful information. Two lines are shown. The solid line represents the trend in new members; the dashed line is the trend in renewals. Note that the two lines are diverging slightly over time; the gap between new members added and the same members’ renewal is increasing—slightly.



**New Member Retention
2000 - 2004**

Year	New Members	New Members Retained	% Retained
2000	5	2	40.00%
2001	18	6	33.33%
2002	34	10	29.41%
2003	22	16	72.73%
2004	27	-	-

Source: Membership database.

It cannot be over-emphasized that the numbers involved in these retention statistics are very small. A net gain of new members is realized every year; the focus here is on the number that renew. One or two years of higher-than-average membership retention would completely redraw the trend lines. An important point to draw from this information is that a small variation in renewal figures can provide for a larger net gain over time.

A second point to consider is the overall gain or loss in total membership over time. This can be seen if we look a little deeper into the data. If you refer back to the graph on total membership it can be seen that there was a larger-than-average increase in membership totals for 2002, but a return to the general trend for 2003. Compare this to the table presented above on membership retention. Of the 34 new members added in 2002 only ten renewed the following year. But this is not the whole story.

Let's look more closely at a specific year. In 2003 the BMTA had a net loss from the previous year of twenty members ($190-170=20$). If no new members joined, this would mean that twenty members did not renew. However, we know that twenty-two new members joined the organization. This means that in order to have a net loss of twenty members ($190-170=20$) as well as an increase of twenty-two new members, forty-two members must have dropped their membership (net decrease of 20 members + 22 new members = 42 previous members not renewing). We know from the previous table that twenty-four of the new members for 2002 did not renew in 2003; this accounts for 57% of the loss in members for 2003. The table to the right presents a summarization of the net membership loss for the past three years.² There have been net losses in each of those years. While the fact that some members were lost between 2002 and 2003 was obvious from the total membership table that appeared earlier, the loss of ten members between 2001 and 2002, and the twenty-six members lost between 2003 and 2004, is unexpected.

**Membership Loss
2001 - 2004**

Year	Total Membership	New Members	Membership Loss
2001	166	18	n/a
2002	190	34	-10
2003	170	22	-42
2004	171	27	-26

² This table was created for this report, and did not appear in the handout material provided to the Retreat participants.



Financial Statistics

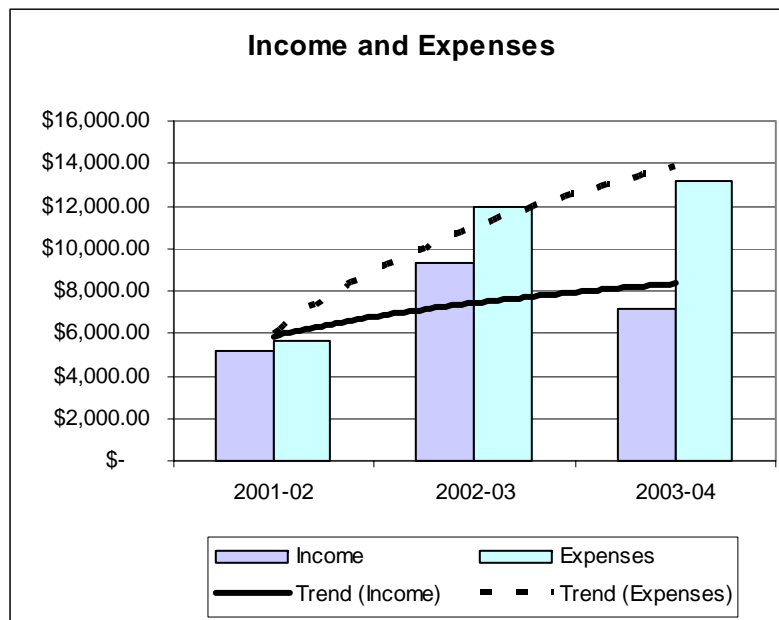
While membership provides the workforce of the BMTA it also provides the financial resource necessary to carry out many of the projects of the organization. Membership and finances are intimately related as will be seen in the information presented below. One note of caution before examining the financial information: in 2002 and 2003 the organization carried out a direct appeal for donations towards publication of the BMT Guidebook. Income and expenses for this period were above what would have been expected. In the absence of a direct appeal campaign donations would not be expected to remain such a large part of the income of the organization.

The table and graph presented here provide a summary of the income and expenses of the Association over the past three years. As can be seen, expenses have exceeded income over that period. Trend lines are provided on the graph; a solid line for income and a dashed line for expenses. Note that even accounting for the above average expenses due to the cost of the Guidebook, and the above average level of donations to pay those expenses, the trend lines show a divergence. Expenses are increasing slightly faster than income.

BMTA Income & Expenses Summary 2001 - 2004

Fiscal Year	Total Income	Total Expenses
2001-02	\$ 5,177.25	\$ 5,654.54
2002-03	\$ 9,337.50	\$ 11,993.84
2003-04	\$ 7,144.17	\$ 13,168.56

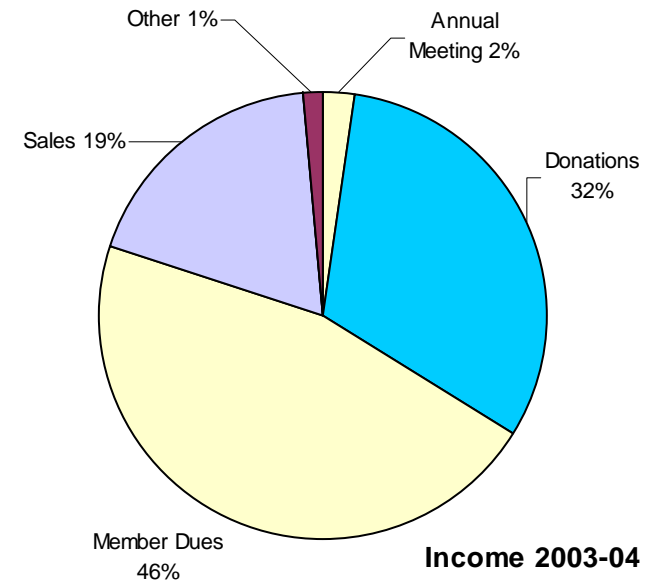
Source: BMTA Treasurer
 Figures are for September 22 of each fiscal year.



The following table provides a break-out of the items and amounts that make up the income and expenses figures shown in the previous table. Note the “donations” category—a direct appeal letter was sent to the membership to solicit donations specifically for the guidebook costs. The guidebook costs appear in the “miscellaneous” category in the expenses section. The pie chart to the right shows the relative percentages by source of income for the past year. Note that membership dues are the single largest source of funds (46%); in 2001-02 dues made up 51% of the total income (the year before the major donation drive); in 2002-03 this figure was 21%.

**BMTA Income & Expenses
Breakdown 2001 - 2004**

Category	2001-02	2002-03	2003-04
Income			
Annual Meeting	\$ 65.00	\$ 244.00	\$ 165.00
Donations	1526.05	6467.00	2257.80
Member Dues	2615.00	1995.00	3293.00
Sales	530.70	601.50	1328.37
Interest (CD)	334.02	0.00	0.00
Other Income	106.48	30.00	100.00
Expenses			
Administration*	\$ 126.96	\$ 39.90	\$ 102.71
Tools	91.97	0.00	0.00
Annual Meeting	0.00	0.00	5.00
Bank Charges	35.00	35.00	80.00
Goods for Sale	413.49	656.14	881.85
Miscellaneous**	537.25	6466.45	6848.00
Newsletter	2522.34	2303.40	3322.57
Other Printing***	203.70	138.24	383.51
Rentals****	318.00	188.00	523.00
Maintenance/Signs	1405.83	2166.71	1021.92



Source: BMTA Treasurer.

*Administration includes postage for newsletters.

**Miscellaneous includes Guidebook, dues and web site.

***Other printing includes membership roster and brochures.

****Rentals include P.O. box and tool sheds.



It is recognized that some expenses are scaled to the size of the organization (newsletter printing, for example, goes up as the membership increases) while others remain relatively constant no matter the size of the BMTA (e.g., bank fees, storage space rental). For unusual expenses, such as the Guidebook, appeals for donations can be anticipated to raise the majority of the funds needed. Some expenses are directly related to income. For example, the cost to have goods produced (t-shirts, hats, maps, etc.) is offset by the sale of those goods over time. The most important component deserving our attention is on the income side of the ledger. Excluding donations and the sale of goods, membership dues show the greatest variation from year-to-year. This should emphasize the importance of new and retained membership to a healthy organization.

The final table in this section presents the full line item income and expense report for the BMTA over the past year. This information is provided in order to show a breakdown of the specific items that make up the categories shown in the previous table.



BMTA Line Item Income & Expense Report, 2003-04

<u>Income</u>		<u>Expenses</u>	
<u>Category Description</u>	<u>Amount</u>	<u>Category Description</u>	<u>Amount</u>
Annual Meeting		Administration	
Raffle	\$ 165.00	Postage	\$ 102.71
Donations		Annual Meeting	
Guidebook Fund	\$ 550.00	Misc	\$ 5.00
M.E. Tool Fund	\$ 50.00	Bank	
TN-NC extension fund	\$ 1,000.00	Bank Svc Chg	\$ 40.00
Unspecified	\$ 657.80	Safe Dep Box	\$ 40.00
Dues		Cost of Goods	
Corporate	\$ 50.00	Guidebook	\$ 827.74
Family	\$ 1,340.00	Refund	\$ 12.11
Individual	\$ 953.00	Sec. Map Ptrg	\$ 42.00
Life	\$ 800.00	Miscellaneous	\$ 50.00
Student-Retired	\$ 150.00	Guidebook	\$ 6,000.00
Goods Sold		License-Permits	\$ 30.00
Guidebook	\$ 602.50	Shows-Exhibits	\$ 242.70
Sec Maps	\$ 211.62	Web Site	\$ 525.30
Benton MacKaye Bio	\$ 372.00	Newsletter	
Store Items-Other	\$ 127.25	Bulk Mail Escro	\$ 600.00
Goods Sold-Other	\$ 15.00	Bulk Mail Permt	\$ 150.00
Other Income	\$ 100.00	Printing	\$ 2,572.57
		Printing	
TOTAL INCOME	\$7,144.17	Brochure	\$ 280.35
		Roster	\$ 103.16
		Rent	
		P.O. Box	\$ 136.00
		Tool Shed	\$ 387.00
		Trail Maintenance	
		Misc.	\$ 427.45
		Tools - New	\$ 594.47
		TOTAL EXPENSES	\$ 13,168.56

Source: BMTA Treasurer.

■ The Directors' Retreat

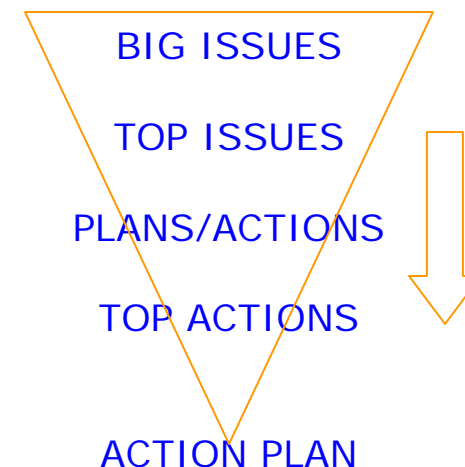
In this section the process and results of the BMTA Board of Directors' Retreat are detailed. The final set of action items, compiled into an Action Plan, is presented in the Appendix. The retreat was held over a nine-hour period, and included a combination of break-out groups and discussions by the full group. All current Directors were invited, and ten were able to attend. In addition to the Board members one guest from North Carolina was included in order to get the perspective and experience of someone familiar with trail associations and who lives in an area where the BMTA will be recruiting new members.

The Process

The graphic to the right presents a summary of the process carried out at the Retreat. Moving from the top to the bottom, a series of refinements was carried out. At several steps the top items were selected and carried on to the next step. Items that did not get selected are still important, though they were not judged to be as important as the items that “made the cut.” (Full lists of the items discussed at each step—including the ones that didn’t “make the cut”—appear below.)

To summarize the process:

1. The group identified **BIG ISSUES**; these tended to be general items or issues that they wanted to discuss. These were organized in three categories: opportunities, strengths and challenges.
2. From the Big Issues the group selected a set of **TOP ISSUES** that the group would continue examine. This was done by voting based on preferences and importance.
3. General **PLANS** and **ACTIONS** were then developed that would address the Top Issues.
4. The **TOP ACTIONS** were selected from the list of Plans and Actions. This was done by a non-weighted vote.
5. For every Top Action a responsible party was identified and a timeframe for the action was established. (Some Top Actions were identified at this step as not being ready to move forward or not to be undertaken at present.) A compilation of these Top Actions makes up the **ACTION PLAN**.



The Results

The first step in the action plan process was to identify the BIG ISSUES that confront the organization. This was done by breaking the participants into three groups, each with a specific area to discuss: opportunities, strengths, and challenges. The three groups worked up lists of Big Issues in their category, and presented their findings to the rest of the Retreat participants. All participants were given an opportunity to add any issues they felt had been left off the lists. Once the lists were complete the participants voted for what they felt were the top issues in each of the three categories. This was a weighted vote—each participant was given five votes to use in each category, with no restriction on how many of those votes could be used on a single topic. For example, the five votes could be used to vote for five different issues, or all five could be used to vote for one issue, or any combination between the two could be employed.

The following lists present the issues identified by the participants, as well as the votes received (in parenthesis).

Big Issues – Opportunities

Campus & Youth groups (9)	Inner-city kids (1)
Marketing incl. a new slogan (9)	“Trading sections” – maintainers trade their sections for a period of time (1)
Grants (7)	Permanent walk-thru – a link on the web site where any BMT hiker can post a trail report (1)
Publicity (7)	Festivals (1)
Communities on the trail - making contacts in towns and communities along the trail route (6)	Speakers Bureau (1)
Monthly hikes (6)	Gift membership
Initial training/Mentors – standardized training for trail workers and maintainers (3)	Work trips for routine maintenance
Participation – cabin hospitality (2)	Education
Newsletter (2)	



Big Issues – Strengths

Relationship with Forest Service and Park Service (13)

Publications & media – web site and newsletter (10)

“Core” people – knowledge and diversity of views (9)

Beautiful trail (8)

Mission & concept – including AT connection (6)

Alliances with other groups (4)

Structure and stability (2)

Name recognition (2)

Patrons – e.g. Sisson (1)

Partnerships – e.g. Healthy US (1)

Connection – people and trail

Big Issues – Challenges

Membership (27)

Trail right-of-way protection (10)

Center of gravity – perception as an Atlanta-based organization (10)

Designated campsites – overuse of some areas (6)

The next step in the process was to identify the TOP ISSUES from the three categories. Top choices, indicated by the votes received, in the “opportunities” and “strengths” categories identify resources that can be used to carry out the plans ultimately created through this process. For example, an action formulated to address the issue of trail right-of-way protection (from the “challenges” category) could be greatly helped by the strong relationship that the BMTA enjoys with the Forest Service and Park Service (from the “strengths” category).

The top choices in the “challenges” category would be the focus of the remainder of the Retreat. It was decided by the group that two of the challenges—right-of-way protection and designated campsites—could be combined into one category, to be called “trail quality”, so that all of the challenges would remain in discussion.

Next, a set of PLANS & ACTIONS was developed for each of the three issues areas (membership, trail quality and center of gravity). The participants broke into three groups, each brainstorming actions for one of the three Top Issues. The groups



presented their finding to the rest of the participants, and opportunities were given for adding action ideas. The lists created for each of the issue areas are reproduced below, with the vote totals received (in parenthesis). In this case, each participant had three votes to use in each category, and was restricted to using no more than one vote per action item.

Challenges - Membership

- | | |
|------------------------------------------------------|---------------------------------------------------------|
| New complete section maps for TN and NC, then GA (8) | Guidebook revision and addendum (6) |
| Market BMTA to local groups (8) | Use newsletter to increase participation (5) |
| Membership campaign (8) | “Needs” coordinator to identify and publicize needs (3) |
| New brochure and web site (8) | Increase worker & maintainer to membership ratio (4) |
| 25th anniversary mail-out “blitz” (7) | Communities on the trail (1) |
| More effective publicity in local media (6) | |

Challenges - Trail Quality

- Protect trail corridor
- Maintain trail quality

Challenges - Center of Gravity

- Add P.O. Box in TN and/or NC (11)
- Additional state representation (10)
- Enlarge newsletter - include state sections (8)
- State chapters (2)
- Coordinate worktrips between states (2)



At this point, the three TOP ACTIONS in each issue area would have been selected for further examination. Rather than take just the top three vote-getters in each category, the group decided to modify their selection process. Since there were only two general actions proposed in the “trail quality” category both would remain in discussion. Also, since membership was deemed to be such an important issue the top seven vote-getters (two were tied for sixth place) would be selected from that category. In the “psychological location” category the top three issues were chosen.

The final step in the process of creating an ACTION PLAN was to further define the Top Actions from the last step into specific, measurable actions with identified parties responsible to carry them out and a timeframe for start and/or completion. In the following lists only the general action item and specific actions are listed; the complete list including responsible parties and timeframes appears as the Action Plan in the appendix.

Actions - Membership

New Complete Section Maps for TN and NC, then GA

- Identify the sections of the new route
- Create descriptions of the sections
- Layout maps of the sections
- Print maps

Market BMTA to Local Groups

- Identify groups to be approached
- Develop presentations for groups
- Promote specific trips and locations

Membership Campaign

- Encourage giving memberships as gifts
- Develop a general appeal to recruit new members

New Brochure and Web Site

- Redesign using eye-catching images
- Maintain a consistent look
- Develop a new slogan



- Re-orient diamond on some logos so all match

25th Anniversary Mail-Out “Blitz”

- Develop mailing lists (hiking clubs, etc.)
- Develop content for mailers
- Hold a mail-out party to stuff envelopes

More Effective Publicity in Local Media

- Budget resources – spend money to promote the BMT and BMTA (newspaper ads, festivals)
- Promote through articles
- Promote through Guidebook reviews

Guidebook Revision and Addendum

- *No actions developed at present*

Actions – Trail Quality

Protect Trail Corridor

- Obtain permanent easements on Georgia properties
- Obtain conservation easements in TN and NC
- Research liability laws relating to conservation easements
- Support the Forest Service activities to resolve the Monroe County TN Board of Education land issue
- Present a program to the nature Conservancy, Foothills Conservancy, Trust for Public Lands
- Seek designation as a National Scenic Trail
- Host workshop on trail protection
- Pursue grants

Maintain Trail Quality

- Mark designated/suggested campsites
- Coordinate re-routes



- Maintain the same standards throughout the route
- Develop standards for training new maintainers

Actions – Center of Gravity

~~Add P.O. Box in TN and/or NC~~

This action topic was dropped after further discussion.

Additional State Representation

- Increase current “at-large” Board positions to three; they become state representatives

Enlarge Newsletter

- Print six pages when needed
- Introduce state sections with “local” news and information
- Introduce “needs” box listing organizational needs



■ Appendix – Action Plan

<i>Action Item</i>	<i>Responsible Party</i>	<i>In Coordination With</i>	<i>Time Frame</i>
TRAIL QUALITY: Protect Trail Corridor			
Obtain permanent easements on private Georgia properties the trail crosses	President	Person or committee appointed to report to Board	On-going
Obtain permanent conservation easements on private property the trail crosses in TN and NC			No action at present
Research liability laws			No action at present
Support the Forest Service in its actions to resolve the Monroe Co. Board of Education land ownership issue	Construction Director	Board of Directors	On-going
Develop and present a program on the trail to various conservation groups (Nature Conservancy, Foothills Conservancy, Trust for Public Land)	Vice-President	Publicity Director	On-going; quarterly reports to Board
Seek to have the BMT designated as a National Scenic Trail or National Recreation Trail	Conservation Director	Board of Directors	Fact-finding report to Board 90 days after completion of entire trail
Host workshop on trail protection	President	Person or committee reporting on easements	Next two years
Pursue grants	Secretary	Board of Directors	On-going; quarterly reports to Board
TRAIL QUALITY: Maintaining Trail Quality			
Identify suggested campsites	Maintenance Director(s)	Forest Service and National Park Service guidelines	On-going; quarterly reports to Board

Coordinate re-routes of the trail	Maintenance Director(s)	Construction Director	On-going; quarterly reports to Board
Maintain the same trail standards along the entire trail route (communication to maintainers and worktrip crews)	Maintenance Director(s)	Construction Director	On-going; quarterly reports to Board
Standardize the training for new maintainers before assignment to a section	Maintenance Director(s)	Construction Director	On-going; quarterly reports to Board
CENTER OF GRAVITY: Perception as a Georgia-based Organization			
Create Board positions of State Representatives by adding one At-Large Director and changing the position title (By Laws change)	President	By Laws Committee	Propose change at 2004 Annual Meeting
Enlarge the Newsletter to 6 pages (when possible); introduce state sections/news; introduce "needs" column to announce organizational needs	President	Newsletter Director	On-going
MEMBERSHIP: Brochure & Web Site			
Redesign logo (re-orient the diamond) to be consistent with trail blaze	Publicity Director	Board of Directors	Within 6 months
Re-design brochure to update information and include eye-catching images	Publicity Director	Membership Director; Construction Director; President	Within 6 months
Re-design web site to be consistent with the new brochure	Publicity Director	Web Master	Within 6 months
Solicit ideas for a new slogan by holding a contest through the newsletter	Publicity Director	Newsletter Director	Within 6 months
MEMBERSHIP: 25th Anniversary Announcements & Publicity			
Develop letter announcing 25 th Anniversary	Membership Director	Board of Directors	By January Board meeting
Develop master mailing list from other group mailing lists	Membership Director	Board of Directors	By March 2005
Mail out material	Board of Directors		By April 2005

MEMBERSHIP: Membership Campaign			
Encourage current members to give BMTA membership as a gift to others	Membership Director		December newsletter
General appeal to recruit new members			No action at present
MEMBERSHIP: Marketing the Organization/Promoting the Trail			
Identify groups to be approached	Vice-President	Board of Directors	On-going; quarterly reports to Board
Develop presentation and present to interested groups	Vice-President	Publicity Director	On-going; quarterly reports to Board
Promote the use of specific trips/locations based on group size and ability	Vice-President	Maintenance Director(s)	On-going; quarterly reports to Board
MEMBERSHIP: Route Maps			
Develop section maps for TN and NC; update the GA maps	President		Status report 90 days after last blaze is painted on Phase Two
MEMBERSHIP: Guidebook Revision & Addendum			
No action specified at this time			No action at present
MEMBERSHIP: Local Media Publicity			
Spend money where appropriate to gain publicity (i.e. festivals, advertisements)	Publicity Director	Board of Directors	On-going
Promote the trail and organization through newspaper articles and announcements	Publicity Director	Board of Directors	On-going
Promote the trail and organization through reviews of the guidebook	Publicity Director	Board of Directors	On-going