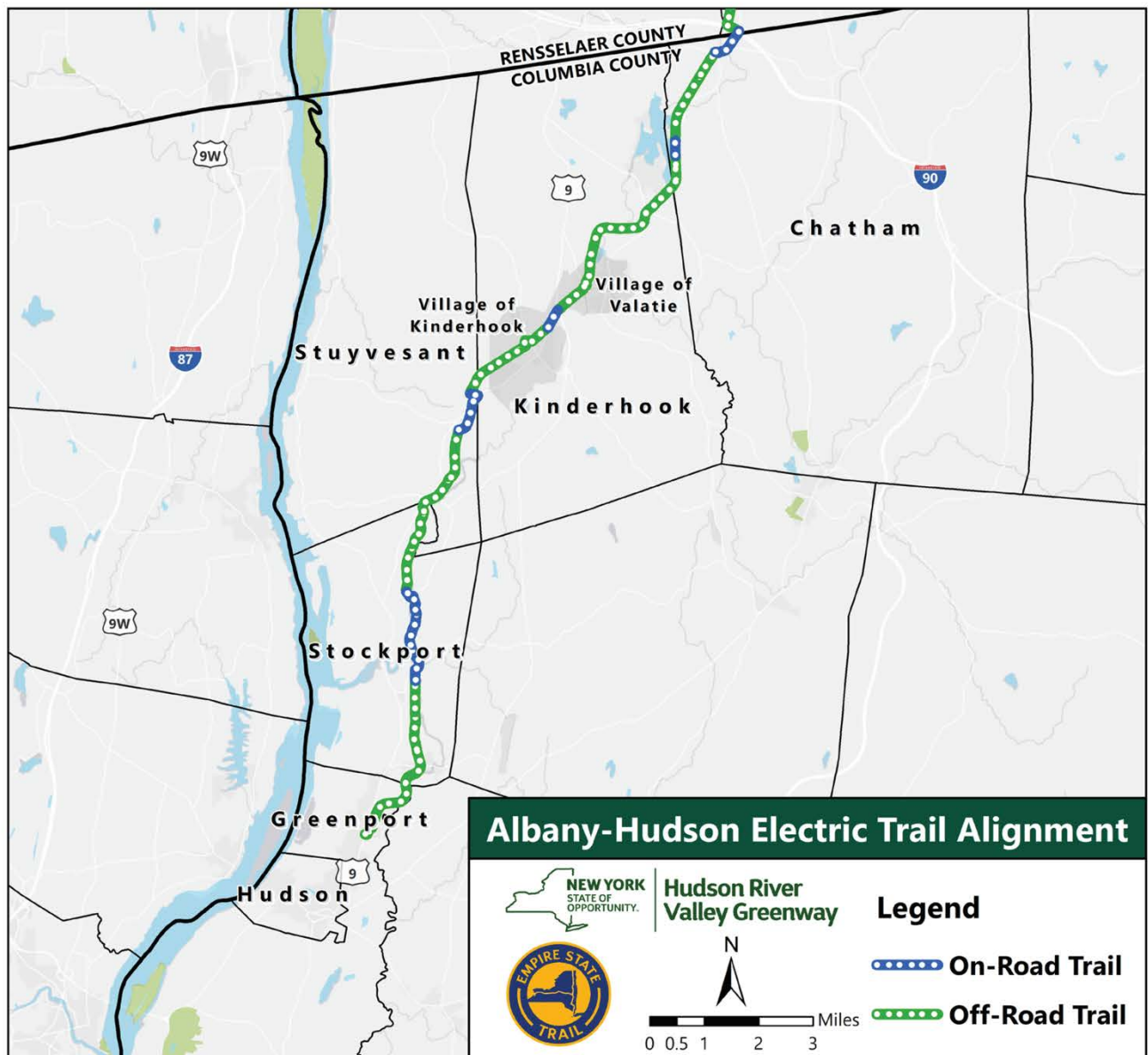




CFET STRATEGIC PLAN

A PRACTICAL PLAN FOR GROWTH & A ROADMAP TO SUSTAINABILITY





Acknowledgements

The development of the Columbia Friends of the Electric Trail (CFET) 2021-2024 Strategic Plan followed an all-inclusive and participatory process that consisted of a review of standard organizational documents; a pre-project survey; three, all-board retreats; SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis; multiple strategic planning committee meetings steered by Deborah Shakotko, Robin Benziger, and Ronald Rich; and several iterations of the resulting plan.

Creation of the 2021-2024 CFET Strategic Plan was supported with funding from NYS Park and Trail Partnership Grants and New York's Environmental Protection Fund. Park and Trail Partnership Grants are administered by Parks & Trails New York, in partnership with the NYS Office of Parks, Recreation and Historic Preservation.

CFET wishes to acknowledge and thank:

- the full CFET Board of Directors for their dedicated participation to the planning process, providing feedback and the inputs that built this plan;
- Jessica Hansen, MNA, of Jessica Hansen Consulting, for her facilitation of the strategic planning process and guidance in conceptualizing the full plan;
- and to the Hudson River Valley Greenway, for advancing the state's commitment to the preservation, enhancement, and development of the world-renowned scenic, natural, historic, cultural, and recreational resources of the Hudson River Valley, while continuing to emphasize economic development activities and remaining consistent with the tradition of municipal home rule.

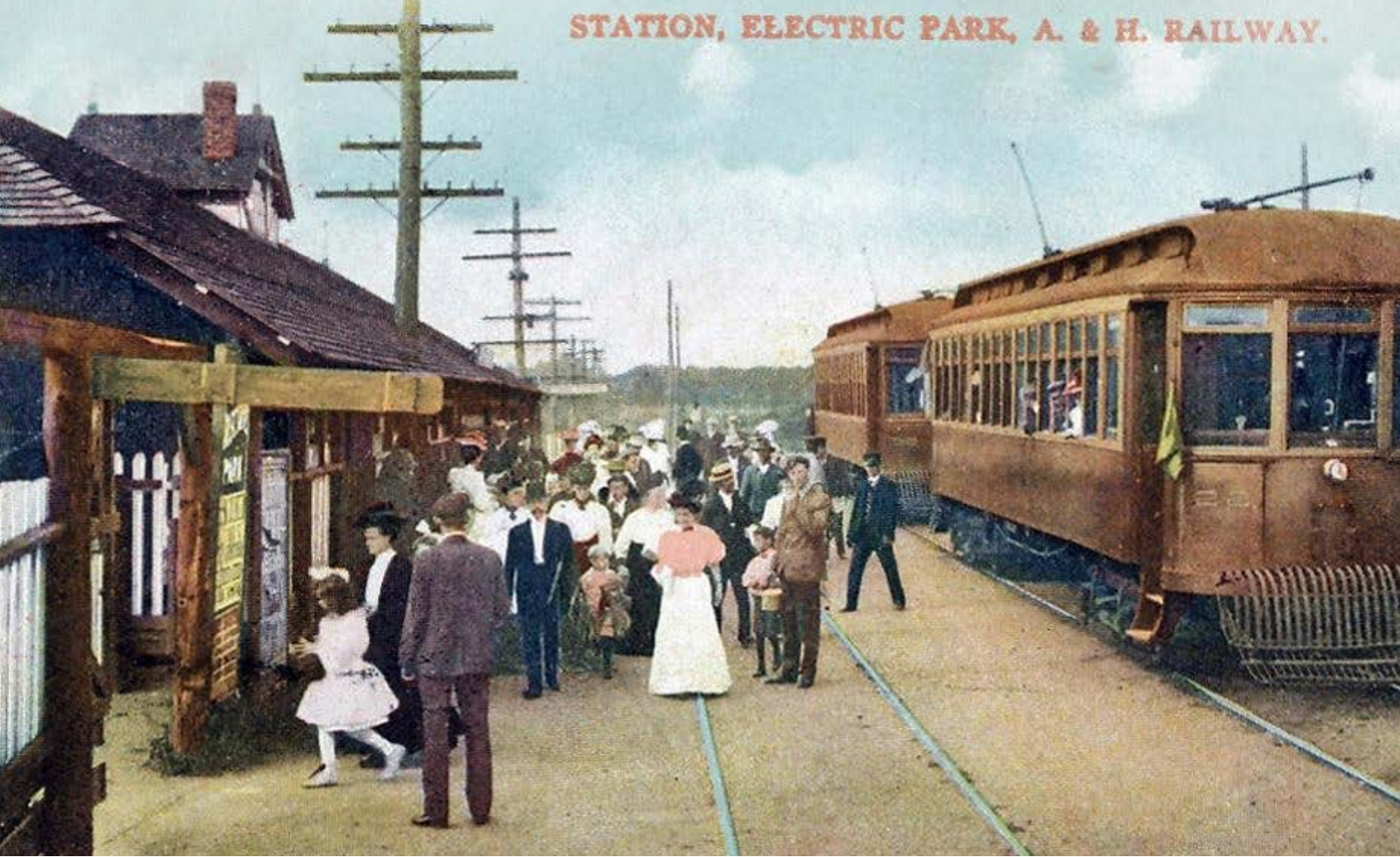
2021 Board of Directors

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Last updated July 2021.

Columbia Friends of the Electric Trail (CFET), P.O. Box 11, Valatie, NY 12184 • contact@CFETNY.org



Electric Park Station, c. 1904

Background

New York State's railway system has been an integral part of its heritage and history since the 1800s. With the rise of the Age of the Automobile in the 1940s and 1950s, private ownership of cars and trucks became more affordable and common. Commercial transport now included planes, freighters, and automotive vehicles. Reliance on trains declined and many of New York's rails fell into disuse. While emissions from combustible auto engines increased pollution, hundreds of miles of railway disappeared under vegetation and crumbled from neglect. Active highways line New York State and so did a potential natural trail system.

Thus, the **Hudson River Valley Greenway Act of 1991** (the "Greenway Act") created a process for voluntary regional cooperation among 264 communities within 13 counties that border the Hudson River. This act allotted funding to transform the abandoned trails into protected nature trails, rebuilt and fashioned to serve as a recreational asset to local communities. The Greenway Act describes the "Greenway criteria" as "the basis for attaining the goal of a Hudson River Valley Greenway."

The Greenway criteria –natural and cultural resource protection, regional planning, economic development, public access, and heritage and environmental education– provide the overall vision for voluntary local Greenway programs and projects.

The general nature of the Greenway criteria allows communities to develop locally based projects that address community concerns, while contributing to the overall framework of the Hudson River Valley Greenway:

1. Natural & Cultural Resource Protection

Protect, preserve, and enhance natural resources including natural communities, open spaces and scenic areas as well as cultural resources including historic places and scenic roads.

2. Economic Development

Encourage economic development that is compatible with the preservation and enhancement of natural and cultural resources including agriculture, tourism the revitalization of established community centers and waterfronts.

3. Public Access

Promote increased public access to the Hudson River through the creation of riverside parks and the development of the Hudson River Valley Greenway Trail System.

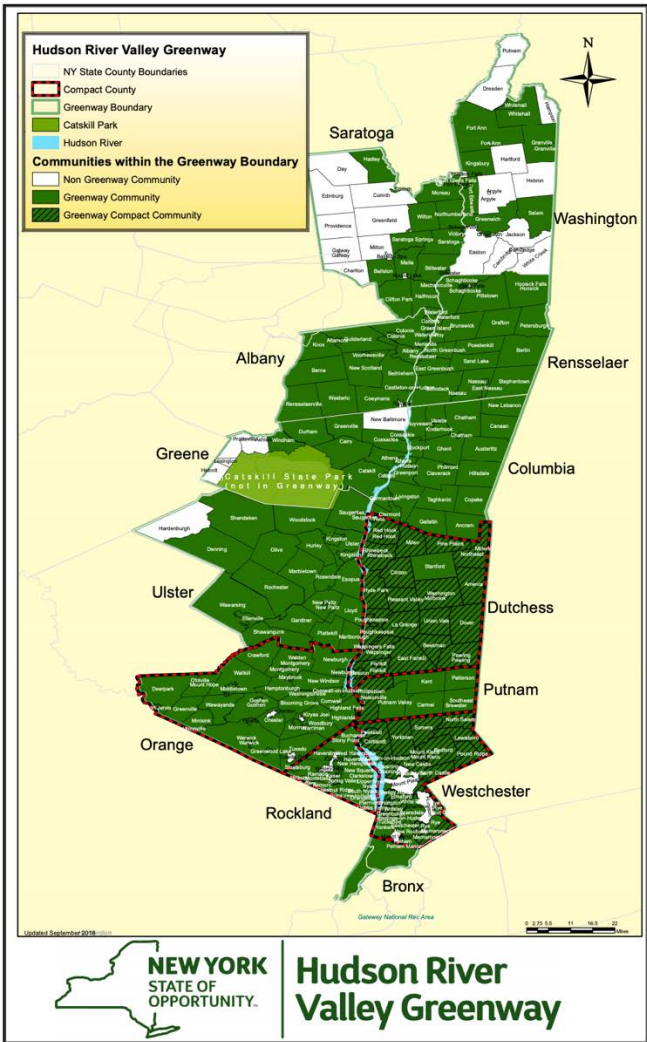
¹ Source: <https://hudsongreenway.ny.gov/greenway-actcriteria-strategic-plan>

4. Regional Planning

Communities can work together to develop mutually beneficial regional strategies for natural and cultural resource protection, economic development (including necessary public facilities and infrastructure), public access, and heritage and environmental education

5. Heritage & Environmental Education

Promote awareness among residents and visitors about the Valley's natural, cultural, scenic and historic resources.¹



The Empire Trail²

A plan to provide \$200M to develop a statewide trail was launched by Governor Andrew Cuomo in 2017. It included joining the north-south **Hudson River Valley Greenway** with the east-west **Erie Canalway**, to form the 750-mile **Empire State Trail**, the largest, multi-use, non-motorized transit option in the US, connecting communities across 27 of New York's 62 counties. The Empire Trail was completed in December of 2020 and now

connects New York's unique places, diverse history, and iconic landscapes, including 135 urban centers and 45 village main streets from New York City through the Hudson River Valley, west to Buffalo along the Erie Canal, and north to the Champlain Valley and Adirondacks. Alta's trail user estimate predicts 9 million people will visit the trail each year.³



While the vast trail is a superb resource for New York residents and visitors, there is no universal plan to provide routine maintenance of the trail in its various sections.

Depending on the area, local municipalities, volunteers, or Friends groups take on the responsibilities of mowing, weed whacking, picking up litter, reporting hazards to the Greenway, and procuring equipment, funds, and other resources.

The **Albany-Hudson Electric Trail** (AHET) is a portion of the Hudson Valley River Greenway. It is a shared-use, cycling and pedestrian trail along the 36-mile Albany-Hudson Electric Trolley corridor from Hudson to Rensselaer, running through Columbia and Rensselaer Counties.

Columbia Friends of the Electric Trail

CFET was formed in 2018 to maintain and promote the AHET in Columbia County. It is a 501(c)(3)⁴ nonprofit and donations to CFET are tax deductible within the limits of the

law. Its revenues consist of membership dues, individual donations, fundraising events, loans, sponsorships and grants from public, nonprofit and private sector sources.

The CFET Board of Directors realized it needed a plan to build revenue, engage trail users, grow its membership, and position the organization for long-term stability, all to preserve the natural beauty of and public access to the Albany-Hudson Electric Trail. Working with Jessica Hansen Consulting, CFET created this 2021-2024 Strategic Plan.

² For more information on The Empire Trail, visit www.empiretrail.ny.gov

³ Source: <https://blog.altaplanning.com/the-empire-state-trail-building-an-impossible-idea-43c7ff957dd4>

⁴ Tax Identification Number: 83-1492639.

In creating this strategic plan, the CFET Board of Directors engaged in considerable dialogue around its vision, mission, and values statements. It refined its mission statement and created vision and values statements to define its identity and culture.



VISION

CFET's vision is that neighbors and visitors connect to surrounding communities, experience healthy outdoor activity and enjoy the heritage and natural beauty of Columbia County on a safe and iconic trail.



MISSION

Through the dedication of community volunteers, the mission of CFET is to maintain, promote and preserve the Columbia County portion of the Albany-Hudson Electric Trail for the enjoyment of all.



VALUES

CFET's values are: environmental stewardship, safety, transparency, collaboration, respect, and inclusion.

The **Vision** is the aspirational reason CFET came into existence and what it hopes to achieve perpetually for the community. Its foundation is based in creating perpetual enrichment for local communities, through which residents and visitors can rely on using the Albany-Hudson Electric Trail for exercise, to enjoy the environment, and learn more about the history of the region and railways.

The **Mission** is how CFET will reach its vision and create value for the community. Being "keepers of the trail" means they will perform required maintenance, work to preserve the trail sustainably, and promote it to the community so they also become invested in its longevity and service. This will help generate more financial support, as well.

CFET's **Values** are the lens through which CFET weighs decisions and approaches its work internally and externally. The values should be posted on CFET's website with a statement relating the importance of each value. For example, "CFET values the *environmental stewardship* of our natural spaces for the protection and health of our planet and communities."

Over the next three years, CFET will continue to maintain the trail, improve its organizational infrastructure, increase revenue and membership, become more visible in the community, and create and maintain more strategic partnerships. To do this, we've identified 5 main strategic priorities/goals spanning 3 years:



Strategic Goal #1: Manage the trail sustainably.

We will continue to maintain the trail, document a thorough maintenance plan, budget for resources, train volunteers, share safety communications with users and the Greenway, develop a volunteer plan with medical information for emergencies, be proactive with equipment replacement, and evolve the maintenance plan as needed.



Strategic Goal #2: Structure the organization to enhance capacity.

We will form standing committees to meet the goals of the strategic plan in an efficient and effective way, inspire a culture of appropriate trail use, create a comprehensive volunteer program, integrate CFET's mission/vision/values, and explore staffing for succession and future stewardship of the trail.



Strategic Goal #3: Build community and funder relationships.

We will conduct outreach to local businesses and create mutually beneficial partnerships, build professional relationships with funders, combine resources with other trail groups, sponsor community events, create a stewardship plan, maintain great relations with the Greenway, and share positive feedback about CFET publicly.



Strategic Goal #4: Achieve organizational stability & sustainability.

We will launch the Development and Membership Committee, create a development plan to raise operating funds and build a reserve, launch/expand fundraising events, create an annual giving plan, and diversify funding sources.



Strategic Goal #5: Be a visible organization and community partner.

We will promote healthy outdoor activities; attend town halls to listen to and share updates; create an education plan; attract positive attention through PR and marketing; implement a marketing plan that addresses branding, identity, messaging, and specific outreach; host educational, historical, and recreational group tours on the trail; promote local tourism; and add more benefits to membership to incentivize growth.

Strategic Goal #1

Manage the trail sustainably.

We will continue to maintain the trail, document a thorough maintenance plan, budget for resources, train volunteers, share safety communications with users and the Greenway, develop a volunteer plan with medical information for emergencies, be proactive with equipment replacement, and evolve the maintenance plan as needed.

At the beginning of the strategic planning process, maintenance and volunteer plans were already in place. CFET's Board of Directors identified areas to strengthen in both plans to enhance recruitment and safety and procure resources available, as needed, and to meet its strategic goals in this area.

In the short and intermediate terms, the Maintenance Committee will

- Attain funding for and plan to proactively maintain/acquire equipment;
- Create plan for maintenance tasks to be sorted and covered routinely;
- Implement comprehensive maintenance program;
- Document a full training plan;
- Create a safety communications protocol to address trail issues;
- Acquire sufficient equipment for that purpose;
- Communicate safety information for trail users to the Greenway, as necessary, so they may share safe practices to those using the trail;
- Ensure budget sufficiently reflects the funding needed;
- Document volunteers in one place – who, what, where, how, release, medical info, emergency contacts: questionnaire (HIPAA); and in the longer term,
- Explore maintenance to be routinely provided by towns or paid employees.

In the long term, the maintenance plan could evolve to include winter maintenance, expanding its 3-season schedule, and explore hiring a maintenance manager, an operations staff member, or a contractor/consultant to focus on coordination, fundraising and development, and administration.



Strategic Goal #2

Structure the organization to enhance capacity.

We will form standing committees to meet the goals of the strategic plan in an efficient and effective way, inspire a culture of appropriate trail use, create a comprehensive volunteer program, integrate CFET's mission/vision/values into the organization, and explore staffing for succession and future stewardship of the trail.

CFET's Board of Directors acknowledged that much of the organization's work is carried out by several directors. To avoid burnout-related attrition and loss of institutional knowledge in customary Board turnover, a standing committee structure will be adopted, to include:

1. **Finance Committee** (already in place as "Audit Committee"): fiduciary governance, budget recommendations, IRS filings.
2. **Maintenance Committee** (already in place): trail and equipment upkeep and repairs, training and managing maintenance volunteers.
3. **Development and Membership Committee**: raise funds through the community and organizations, and recruit paying members.
4. **Public Relations Committee**: enhance the visibility and brand of CFET.
5. **Volunteer Committee**: recruit and support volunteers and ensure a safe volunteer experience.

It is also recommended that a standing or ad hoc Events Committee be created because they are incredibly time-intensive and the work involved will take away from the progress of other committees, if combined.

CFET refreshed its mission statement to directly express their work and resulting community benefits. They created Vision and Values Statements, considering the aspirational goal at the heart of CFET's existence and the traits that define CFET's organizational ideals through decision-making and conducting business. The resulting statements on page 4 will be integrated into the organization's marketing and culture.

Having enough reliable and capable volunteers builds capacity for an organization because the work can be shared more equally and decrease the chance of burnout. CFET has a volunteer program primarily for trail maintenance, so the creation of a comprehensive volunteer program has already begun. CFET discussed centralizing the effort and expanding recruitment to include potential board members, committee members from the community, fundraising event volunteers, and additional trail volunteers.

Strategic Goal #3

Build community and funder relationships.

We will conduct outreach to local businesses and create mutually beneficial partnerships, build professional relationships with funders, combine resources with other trail groups, sponsor community events, create a stewardship plan, maintain great relations with the Greenway, and share positive feedback about CFET publicly.

In small communities, residents rely on one another for economic sustainability, buying and selling local to keep their small towns and cities alive. “One-of-a-kind” businesses are essential to the identity and character of small communities; their downtowns usually do not have box stores and corporate chains don’t exceed the number of independently run small businesses. This describes many, if not all, of the cities and towns along the AHET.

CFET recognizes this along with the wealth of partnership opportunities with surrounding business, historic sites, and other attractions. Following are ways, reasons, and targets for relationship-building:

- Build relationships with other Friends groups on adjacent trails and explore cross-promotion and co-presentation of events;
- Create a cultivation and stewardship plan specific to each business;
- Use plan to create more resources for trail users and benefits for partnering businesses (for example, discounts for CFET members at a local shop would drive visits to the businesses and create CFET membership incentive);
- Create and share an annual report highlighting partnerships;
- Create and implement marketing & communications plan with specific messaging for business audiences;
- Regularly publicize the community enjoying the trail to bolster brand value;
- Ask partners for recognition benefits within their e-blasts and social media;
- Sponsor educational and recreational events for quid pro quo support; and
- Maintain/expand a good relationship with the Greenway.

When raising funds, it’s also essential to call or meet with potential funders ahead of submitting a grant application, offer them a trail tour with historical context and community value, and keep them updated on CFET’s activities and media. This builds a unique relationship with funders and increases the likelihood of continuing support.

Strategic Goal #4

Achieve organizational stability and sustainability.

We will launch the Development and Membership Committee, create a Development plan to raise operating funds and build a reserve, launch/expand fundraising events, create an annual giving plan, diversify funding sources, and promote local tourism.

Funding was identified as a primary weakness in CFET’s SWOT analysis. In addition to operations, the areas it wishes to expand or improve rely on available funding. Without addressing the other 4 strategic goals —expanding relationships, conducting outreach, providing a positive trail experience or being an intentionally visible organization and partner— additional funding will be unlikely, ultimately limiting the stability and sustainability of CFET.



The AHET is a historic, public-use trail benefiting residents of and visitors to Columbia County.

To increase its budget and create a reserve, CFET’s Development and Membership Committee must take the lead in planning and implementing a development plan that includes goals and diverse revenue streams including, but not limited to: an annual giving program, events, foundation grants, corporate gifts and sponsorships, membership, and planned giving. The plan should provide a pathway to exceeding fundraising goals and creating a 12-month operating reserve.

CFET must also seek funds in a variety of ways. Nonprofits diversify revenue sources to balance risk. For example, if CFET falls \$5,000 short on its individual gifts goal, it can likely make up the difference with a few small grants. If CFET falls \$25,000 short on grants, it would be much more difficult to make up the difference in other budget areas. Annual or individual giving is extremely important, as well; when the economy is weak or a global or national disaster occurs, individual donors will remain loyal and continue to support CFET, whereas foundations and corporations would direct funding to humanitarian aid or human services.

Strategic Goal #5

Be a visible organization and community partner.

We will promote healthy outdoor activities; attend town halls to listen to and share updates; create an education plan; attract positive attention through PR and marketing; implement a marketing plan that addresses branding, identity, messaging, and specific outreach; host educational, historical, and recreational group tours on the trail; and add more benefits to membership to incentivize growth.

The AHET offers 36 miles of The Empire Trail, of which few will experience all 750 miles. The local trail provides accessibility for residents and visitors to Columbia County. Aligning with local tourism organizations will increase use, attract members, and share its history and community value.

Marketing, Communications, and Public Relations are powerful tools in building public trust and, as an organization protecting one of Columbia County's most historic, public-benefit sites, CFET must actively promote itself and continually engage the community in efforts to meet its vision. With the assistance of the Development and Public Relations Committees, the Board of Directors will conduct outreach, share engaging messaging, and expand CFET's public footprint to foster new and strengthen existing relationships. This will include:

- Promoting healthy family outdoor activities;
- Attending town hall meetings and networking;
- Implementing an effective marketing and communications plan;
- Regularly sharing positive community feedback to increase CFET's visibility and cache;
- Interacting with other trail groups and aligning with tourism resources;
- Sponsoring educational and recreational events to build partnerships; and
- Earning more media and sharing co-opted articles of relevance, such as this National Geographic article about the Empire Trail.

 NATIONAL
GEOGRAPHIC



A cyclist pedals along the Canalway Trail in Niskayuna, New York, a section of the new 750-mile multipurpose Empire State Trail.
PHOTOGRAPH BY MIKE GROLL, AP IMAGES

| TRAVEL |

This New York State rail trail isn't just epic—it's also accessible

The Empire State Trail crisscrosses 750 miles of mountains, brewpubs, and the "Grand Canyon of the Adirondacks."

Further, one-to-one meetings and regular collaboration with businesses and historic sites that align with CFET's mission and values are a direct way to develop sustainable partnerships that benefit the whole community.

CFET is routinely measuring the success of the strategic plan because it must:

1. Serve the community according to its mission, vision and values;
2. Gauge ongoing effectiveness and identify when to course-correct; and
3. Report its goals and progress to funders and the community.

The Board of Directors will periodically self-evaluate its progress on meeting the milestones of this plan and measure progress in quantitative and qualitative terms. **This will be spearheaded by the Strategic Planning Steering Committee and results will be recorded for future reference.**

Additionally, milestones may be amended by the Board, in keeping with CFET's mission, vision and values.



Quantitative success is measured by tangible outcomes, which are often number- or dollar-based. Qualitative success is exemplified by anecdotal and intangible evidence.

Example

CFET will conduct outreach to businesses and historic sites to create mutually beneficial partnerships providing discounts to CFET members and driving visitors to partner sites.

Quantitative Outcomes

- CFET's membership grew by 25 new members.
- 53 CFET members visited the Olana State Historic Site in 2022, using their CFET discount.
- Increasing membership resulted in increased revenue of \$1,000 for CFET.

Qualitative Outcomes

- Members are learning more about the area's history, using their CFET member discount to visit local historic sites.
- CFET is contributing to economic growth for businesses in Greenport by driving its members to these sites.
- Members feel more valued with added membership benefits.

General Operating Budget

An appropriate budget is essential to meeting CFET's increasing maintenance and promotional needs. With a small operating budget, small foundation and corporate grants, event sponsorships, memberships, and individual donations are the best way to increase revenue. Fixed expenses are not anticipated to increase much or quickly. Expenditures that will increase are related to fundraising and capacity building activities. Posting a net at the end of each year will allow CFET to build reserves for unexpected situations and amass resources for growth.

REVENUE	FY 2020	FY 2021	FY 2022*	FY 2023*
Donations	100	2,000	3,000	4,000
Fundraising Events	2,000	4,000	4,000	4,000
Grants	100	10,000	5,000	5,000
Greenway Grant	10,000	10,000	10,000	10,000
Membership Dues	8,000	8,000	8,500	9,000
Merchandise Sales	700	250	400	600
TOTAL REVENUE	\$20,900	\$34,250	\$30,900	\$32,600

EXPENSES	FY 2020	FY 2021	FY 2022*	FY 2023*
Advertising	500	500	500	500
Clean-Up Expenses	100	400	200	200
Equipment Reserve ⁵	3,990	-	3,000	6,000
Equipment Storage	-	4,500	500	500
Events	1,500	1,500	2,000	2,500
Fuel	600	1,000	1,200	1,500
Insurance	5,500	5,500	6,000	6,000
Maintenance Equipment & Supplies	3,700	5,000	5,000	5,000
Merchandise Inventory	900	500	500	500
Mule Debt Service		3,500	6,000	1,500
Office Supplies & Printing	2,000	2,000	2,500	2,000
Outside Services (website & strategic Plan)	300	10,000	1,000	1,000
PayPal & Squarespace Fees	350	400	400	450
Postage & P.O. Box	460	460	560	660
Protective Equipment	1,000	700	700	700
TOTAL EXPENSES	\$20,900	\$35,960	\$29,540	\$29,010
NET	-	(\$1,710)⁶	\$1,340	\$3,590

⁵ Original, large equipment donated by the Greenway includes a transport trailer, 2 zero-turn mowers, and the Niverville storage garage. CFET will require funds to maintain and replace these, as needed.

⁶ 2021 includes startup expenses as this is the first year of trail maintenance. 2022 & 2023 are projections.

Service area: from North Chatham to Greenport, Columbia County.

North Chatham Trailhead

10 parking spots
Depot Street
North Chatham, NY 12132

Niverville Trailhead

11 parking spots
Intersection of State Route 203 and Main St. (County Route 28)
Niverville, NY 12130

Valatie Route 9/9H Park & Ride Lot

50 parking spots
Intersection of State Routes 9 & 9H
Valatie, NY 12184

Village of Kinderhook- Rothermel Park

33 parking spots
Rothermel Ave.
Kinderhook, NY 12106

Stuyvesant Falls Trailhead

4 parking spots, plus 20 spots on east side of bridge
County Route 25A (Hudson Ave.)
Stuyvesant Falls, NY 12174

Stottville Trailhead

15 parking spots
Little League Field, Atlantic Ave.
Stottville, NY 12172

To access a full map, visit www.empiretrail.ny.gov.



Roadside Parking: Towns and Villages have different laws that apply to roadside parking. Check with your local government to find out their policy before parking on a roadside.
Please respect the privacy of residents who live nearby.