



FRIENDS OF THE OUTLET, INC. (FRIENDS)
STRATEGIC PLAN 2016-2017
(Approved by the Board of Directors September 21, 2016)

BACKGROUND

There are multiple reasons to have a strategic plan as part of an organization's management approach, these include:

- Provide a roadmap for addressing and completing goals, objectives, and key activities over a set time period;
- Identify and clarify the organization's priorities to members, the Board of Directors, and to others;
- Link goals, objectives, and activities to the budgeting process;
- Demonstrate to potential funders the worthiness of supporting the Friends and Outlet Preservation Area activities;
- Encourage members and others to participate in accomplishing objectives; and
- Provide a basis for evaluation approaches and measures to determine (1) the degree to which objectives were, in fact, accomplished, and (2) to inform the next strategic planning process.

Ultimately, a strategic plan shows that the Board is taking steps to successfully manage a complex organizational setting in a dynamic social, political, and economic context. Additional information can be found at: <http://keukaoutletrail.org/index.html>.

There are numerous approaches that can be taken to develop a strategic plan. Generally, the strategic plan is a group-developed document that obtains input from those within the organization to reach agreement on the document. Input can also be obtained by others outside the organization if such is thought to be necessary for member or community "buy-in." A "good" strategic plan is one that is agreed to by the Board; is relatively short, is easily understood, is realistic, is a public document, and draws upon the strengths of the organization to identify and address goals, objectives, and activities.

NEEDS ASSESSMENT

Typically, an initial activity that may be part of strategic planning is a needs assessment. The intent of the needs assessment is to obtain data from various stakeholder groups and identify key trends and issues that might be considered as part of

the plan. A needs assessment can include data collection activities such as an environmental scan, a SWOT (Strengths, Weaknesses, Opportunities, and Threats) review affecting the organization, focus groups and/or surveys of key stakeholder groups, etc.

For this initial strategic plan no formal needs assessment will be undertaken as the Board has received significant informal input and information during the last two years from sources such as:

- Yates County Legislature;
- The Land Trust Alliance;
- Penn Yan Area Businesses;
- Users and Non-users of the Outlet Preservation Area;
- Local schools and other educational institutions;
- Friends' Board of Directors' knowledge and hands-on experiences of the Trail;
- Not for profit groups such as the Penn Yan Lions; and
- State and local town and village governments.

In addition, the May 2014 flooding to Penn Yan and the Outlet provided significant discussion and input about maintaining and organizing the Outlet Preservation Area. Thus, the Board believes it has received plenty of input to develop this strategic plan. A needs assessment, nonetheless, may be appropriate as input to the 2018 strategic plan.

VISION

The Friends intend for the Outlet Preservation Area to (1) become one of the signature destinations in Yates County and in Central/Western New York with increased public appreciation for the Outlet as a geological and historical asset, (2) be a collaborative effort supported by members, local governments and other public/private organizations, and (3) realize its potential to promote tourism, economic development, recreational and educational activities, local history, and various special events.

MISSION

The mission of the Friends is to manage the Outlet Preservation Area to promote members' and the public's use, enjoyment, recreation, education, and safety of the Outlet. Moreover, the Friends strive to continuously improve the public's experience when using the Outlet Preservation Area by obtaining adequate funding to improve these experiences. The Friends' expectations are that members' and users' of the Outlet Preservation Area will want to regularly return to the Area and use it for a range of activities and purposes as outlined above and support the Area with their time and resources.

GOALS

The Bylaws of the Friends, approved by the membership April 27, 2016,¹ state that the *purposes* of the Friends are to:

1. Preserve the natural features and beauty of the Outlet Preservation Area;
2. Protect the historic and archaeological sites located within the area;
3. Prevent water, air, land and noise pollution within the area;
4. Encourage natural, physical, outdoor and historic oriented recreation within the area;
5. Encourage and support outdoor and historical education related to the area;
6. Determine sources and seek commitments for funds from other bodies and organizations, both public and private, in connection with the acquisition of rights in and development of the area;
7. Actively seek to acquire rights in lands and waters, including title, easements and the like to make additional property available for public use;
8. Promote and communicate knowledge about the Outlet Preservation Area, its history, and other information through writings, publications, and other means both written and electronic; and
9. Encourage appropriate sustainable development that supports the above purposes.

As such these statements serve as an excellent set of *goals* for the strategic plan. But it is useful to recognize that these goals cover many possible activities and demonstrate the breadth of efforts and activities that *might* be included in the Friends' strategic plan.

A key concept, however, in strategic planning is that *everything an organization needs to accomplish cannot be accomplished all at the same time* – some goals and activities are *more important than others*; some goals and activities might best be done in the future when situational and/or political factors might better support them; and some goals and activities may require too many resources at this time. Moreover, the skills of the Board, Members, and volunteers may be such to state certain priorities *now* as opposed to later when those skills may not be present. **As a general rule of thumb 60% of an organization's efforts should concentrate on selected objectives and activities – the other 40% of an organization's efforts stress maintenance and day to day activities for which objectives are not needed.**

OBJECTIVES, ACTIVITIES, AND MEASURES

These possible objectives, activities, and measures described here should be seen *as a beginning discussion point for this strategic plan for 2016 through 2017*. They flow from the nine purposes listed above which can be considered to be the goals for the Friends. The proposed objectives result from two ranking votes by Board members which resulted in the objectives listed below.

¹ Available at <http://keukaoutlettrail.org/index.html>.

1. Remove 5 major safety concerns along the Outlet.

Possible Strategies

The strategies here might be to first identify the most important safety concerns currently affecting the Outlet Preservation Area, determine the cost and a strategy to repair the concern, and identify people, funding/resources that could fix the concern, and then implement the remedy.

Measurement

How many safety concerns were removed from the Outlet Preservation Area and at what cost?

2. Make and implement recommendations for the Friends' website and electronic presence to have greater use and impact of the Outlet Preservation Area.

Possible Strategies

Draw upon a preliminary analysis conducted for the Board in October 2015 and the September 21, 2016 report to determine the objectives of a new website, what specific steps and improvements can be made on the Website, and at what cost.²

Measurement

Director for Electronic Communication maintains log file analysis³ to determine use, problems, other statistics, and issues on the improved website and determine next steps.

3. Make the Outlet Trail more “user friendly” with, for example, additional signage, parking, and benches.

Possible Strategies

Determine what types of enhancements would make the Outlet more “user friendly;” set priorities for which enhancements would benefit the Outlet the most; determine the cost of those enhancements; conduct a fundraiser specifically to support funding these enhancements or pay directly out of the Friends; and implement/install these enhancements.

² These reports are available from the President of the Board of Directors.

³ See https://en.wikipedia.org/wiki/Web_log_analysis_software for explanation.

Measurement

How many “user friendly” enhancements were made, at what cost to the Friends, and how well were they received by users?

4. Promote the importance, impact, and the role of the Outlet in local economic development to local and state governments and other organizations/groups as appropriate

Possible Strategies

Identify key opinion leaders locally and statewide who need to be regularly informed about the Outlet and Friends activities; have regular meetings or communication with these opinion leaders; provide them with information about the Outlet and determine how the Friends might best work with them; and develop specific strategies with these opinion leaders for gaining their involvement and support for the Outlet.

Measurement

Establish a list of the key opinion leaders to be targeted for co-ordinations and collaborations and count the number of times contact was made with them.

5. Promote the importance and the role of the Outlet in Yates County and Penn Yan for economic development and as part of the *Vision 2020* report.⁴

Possible Strategies

Drawing upon the Board’s August 6, 2015 presentation made to the Yates County Legislature,⁵ develop additional presentations and brochures targeted at appropriate organizations and individuals; hire a consultant or find a volunteer to conduct a study documenting the benefits and return on investment from the Outlet; and collect and organize anecdotes and documentaries from users of the Outlet Preservation Area and others as the importance and benefit of this area.

Measurement

Number of presentations and brochures developed; number of meetings or events conducted; and informal assessment of presenters as to the success of the event.

The above objectives, activities, and measures are at a point such that the Directors can reach agreement on them such that they can be supported with the limited resources

⁴ <http://www.py2020vision.org/>

⁵ Presentation available from the President of the Board of Directors.

currently available to the Friends. The Board will reach agreement on the committees and individuals responsible for taking the lead on accomplishing these at a later date.

EVALUATION

There are two types of evaluation. The first is *formative evaluation*. The purpose of formative evaluation is to monitor activities related to accomplishing a specific objective so that modifications in the strategies can be made (if needed) as corrective action to keep accomplishing the objective “on track.”

Those responsible for a specific objective (either individuals or a committee) will need to determine specific action steps and a timeline to accomplish the objectives, determine if a budget is required, and report regularly on the progress being made at Board meetings. These regular reports provide an opportunity for the Board to determine if corrective actions are needed and should be discussed/included as part of the monthly Board minutes

The second type of evaluation is *summative*. The purpose of summative evaluation is to determine at the end of the planning period:

- The degree to which the objectives were accomplished;
- The factors that contributed to successfully accomplishing the objectives;
- The factors that contributed to not accomplishing the objectives;
- Financial and budgeting factors that did or did not affect accomplishing the objectives and should be considered in the next strategic planning cycle; and
- Situational factors that did or did not affect accomplishing the objectives and should be considered in the next strategic planning cycle.

In November-December, 2017 a Board member or committee would be responsible for producing a short report that summarizes the accomplishments of the strategic planning effort. The report would also make recommendations for objectives and priorities for the next year (2018). The report would be posted on the website, and made available to members, community leaders as others as appropriate.

NEXT STEPS

The Board of Directors had a discussion on the strategic plan, finalized it, and approved it September 21, 2016. With this approval by the Board of Directors, the Friends’ Directors, Friends’ members, and others from the community can volunteer or be assigned responsibility, either individually or as a committee, to work on accomplishing specific objectives between now and December 2017 and conducting the evaluation November-December, 2017. The volunteers and assignments will be finalized in the near future.