



**AAC Five-Year Strategic Plan
Adopted February, 2011**

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Section I—Background

We are America’s national climbing organization and our mission is to be what American climbers want and need. For those to whom climbing is a way of life, the AAC must be a part of that life.

Membership has always been the main way we measure our success. There are many more ways—especially now—to engage with the AAC than just membership: one can access our webpage, become a Facebook fan, or attend any event. But membership is the real measure of our relevance and our main economic engine.

Major moves towards making the AAC a more welcoming organization for all American climbers occurred under the leadership of Presidents Jim McCarthy (86-88) and Glenn Porzak (89-91). The resume and cover letter requirements were removed, the headquarters moved to Golden and Mike Browning led the effort to improve member benefits with rescue insurance. These moves, plus the establishment of the Bates award for young climbers in 1996, laid the foundation for an organization that was relevant to and inclusive of all American Climbers.

Those symbols of change caused membership to grow from historical levels of under two thousand to almost seven thousand members over the course of eight years.

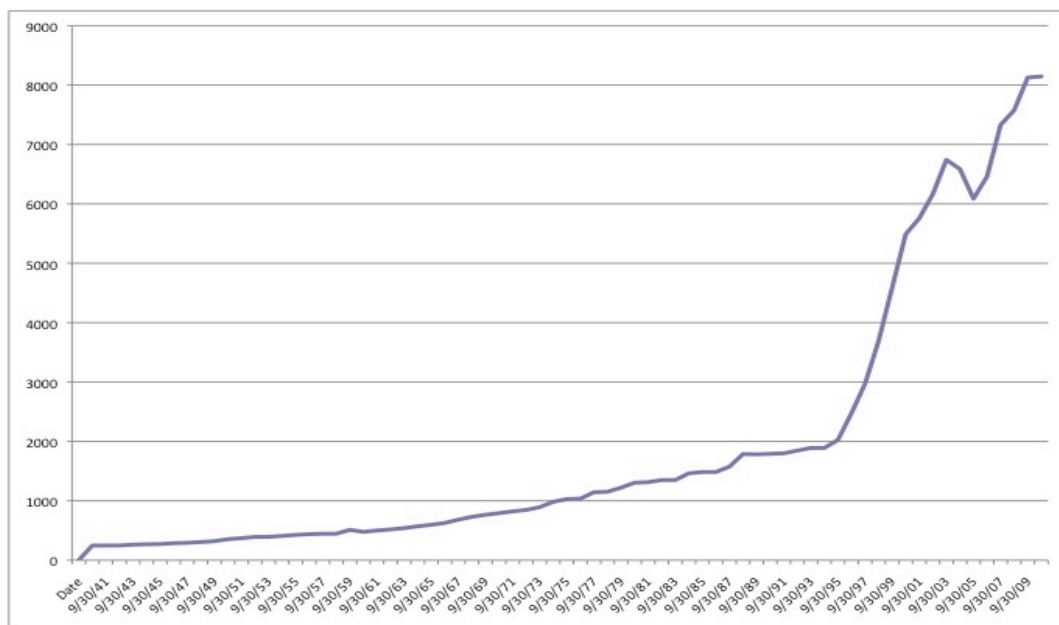


Fig. 1: Membership without the grace period since 1940.

We did not, however, build on that momentum. A great deal of time and resource continued to go into fundraising for the completion of the American Mountaineering Center (AMC, which is co-owned in an LLC with partners Outward Bound and the Colorado Mountain Club). Not until the Mountaineering Museum opened in February 2008 was this project finally complete.

Current Process

In 2005, President Mark Richey laid the foundation for change by hiring Phil Powers as executive director and completing the fundraising for and building of the Mountaineering Museum at the American Mountaineering Center. With major projects in Golden completed, Jim Donini focused his presidency (2006-8) doubling membership by telling our story better. The AAC went through a substantial branding exercise rewriting the mission and vision and establishing a set of attributes to guide the club’s branding and activity. We hired a national marketing director and, in the spring of 2009, clarified our target audience. While the marketing effort that sprung out of this period was by no means perfect, it supplied a pleasant increase in members of 13.8% during a period (fiscal 2009) when other organizations were in decline. With substantial direct mail marketing, the AAC grew 4.8% in fiscal 2010.

- OIA: **2.9 million** climbing 6+x/yr
- Access Fund: Estimates **1.5 million** climbers
- AAC Members: **8.5 thousand** climbers

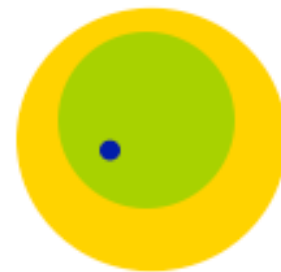


Fig. 2 AAC Market share. Even if there are only 500,000 US climbers, less than 2% are members

Despite the larger numbers in Figure 2, we estimate that there are 500,000 people in the United States who define themselves as climbers. The growth the AAC has enjoyed, therefore, still left the club with less than 2% of a conservative estimate of all American climbers. In addition, a large percentage of staff time and budget were being directed at acquiring members whose loyalty and satisfaction, measured by our retention rate, was in decline. Simply put, rather than focusing on our core mission, our resources were increasingly directed at finding new members to replace those who left. There was a developing consensus among staff and the executive committee that, after devoting time and money to improving the message, the problem was the product itself.

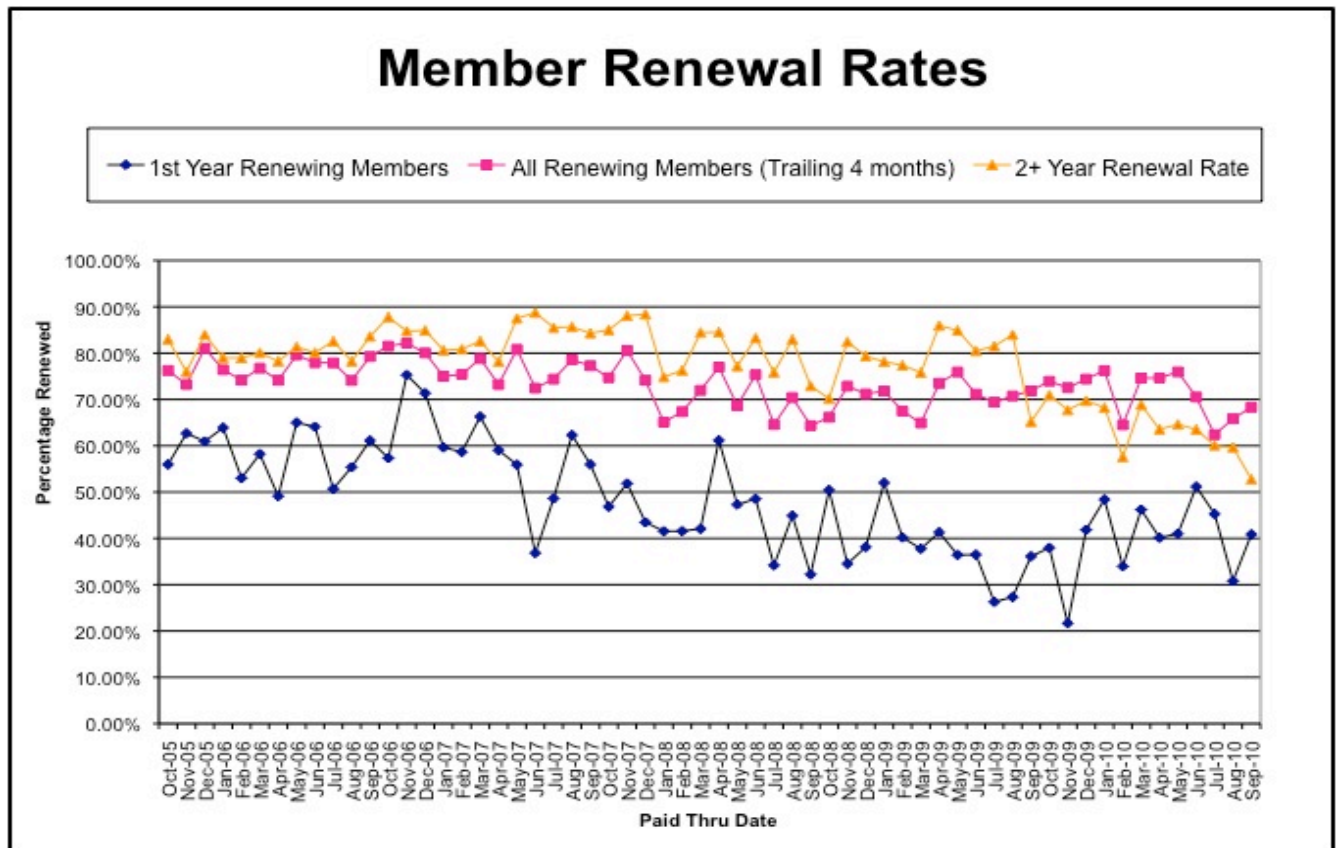


Fig. 3 Though membership has been growing, retention has begun to falter.

The executive committee asked Executive Director Phil Powers to begin work on a presentation that made the case for significant change. Simultaneously, President Steve Swenson began an effort to reach out to key stakeholders including the Club's past presidents. His message was twofold: First, we need to change the organization so that it is more relevant for all climbers. Second, he invited stakeholders to be a part of the process and attend the February 2010 board meeting in Denver where the "Case for Change" was on the agenda.

The "Case for Change" was not built in a vacuum. Marketing Director David Maren fielded a survey during the month of January. The survey, pushed out to members through the AAC's E-News and Facebook page and climbers through Supertopo, Mountain Project and Twitter, obtained over 1,400 responses. An ad hoc planning group—Jim McCarthy, Rob Bondurant, Roanne Miller, Pete Takeda, Paul Gagner, plus staff members Phil Powers, David Maren, and Penn Burris and consultant Tony Contakos—met in Salt Lake City (January 25, 2010) to weigh in on the issues facing the club. The group looked at our environment, partners, competitors and audiences along with early survey results to develop a Strategic Business Framework.

Phil Powers presented the "Case for Change" at the February 2010 board meeting. Three critical issues were identified:

1. Climbing community wants AAC to do more:
 - a. More membership benefits
 - b. Service to community where we live & climb
 - c. More conservation and public policy work
2. AAC Programs are not easy to access, not timely, and too centered in Colorado
3. Business model discourages membership; very little that we do requires that one be a member to enjoy it

At that meeting, the board unanimously passed the following motion:

Move that Paul Gagner populate and chair a Planning Task Force to draft a 5-year strategic plan that substantially improves programs and membership benefits. Success of the plan will be measured by a membership growth target of 50,000. The board will support the plan with a funding campaign. The draft is due at the October [2010] board meeting.

The Planning Task force began as a discreet group of individuals chaired by Paul Gagner and including Steve House, Jim McCarthy, Madeleine Sorkin, Brian Block, Devaki Murch, Dave Sharrat, Renan Ozturk, plus Phil Powers and other staff. In a later meeting Matt Samet, Charley Mace, Sara Close, Kelly Cordes, and Steve Matous joined. The Planning Task Force was a valuable group. Members reached out to their own communities and brought opinions back to planning groups.

Gagner also spent significant time interviewing members of the climbing community, from the well known to average everyday climbers across the full climbing spectrum—



age and activity. He also reached out to section chairs and past presidents, and spent time studying other organizations like Surfrider, IMBA, and the European Outdoor Clubs.

The Planning Task Force findings and those of Gagner's individual outreach efforts were consistent with what the office staff had been hearing from members for several years.

Findings were presented at the June 2010 board meeting (Seattle). The board offered its support of the following "high-level direction" for the plan:

1. Attain Our Vision Through Decentralized, Community-Based Empowerment
2. Conservation—Protecting The Places We Climb
3. Build A Comprehensive Climbing Information Resource
4. Create Meaningful And Compelling Member Benefits Programs
5. Leverage The AAC's Grants Program

And, on a longer time frame:

6. Provide lodging facilities for climbers where they do not already exist

Over the course of the summer, AAC staff and the executive committee worked closely with the support of Paul Gagner as a consultant to deliver a DRAFT AAC Five-Year Strategic Plan.

The DRAFT detailed the business moves necessary to deliver on eight overarching strategies stated as follows:

1. Rebuild the AAC as an Aggregation of Empowered Chapters
2. Regain prominence as a Comprehensive Climbing Information Resource.
3. Deliver a Member Benefits Program with Extraordinary Value
4. Leverage local action through AAC's Grants Program
5. Accomplish our Conservation Mission through Grants
6. Conservation and Advocacy Action
7. Create a separate strategy for the American Mountaineering Center (AMC)
8. Provide lodging facilities for climbers where they do not already exist

The board gave feedback on the Plan at its Yosemite meeting in October 2010 and in the weeks following. The board expressed its intent to fund and fully implement the plan. Finally, the board asked Executive Director Phil Powers to begin making the staff changes and other preparations necessary for implementation.

On November 17, 2010, Powers presented a staffing plan that reorganized the Club into four groups—**Membership and Finance, Community Programs, Information and Marketing, Development**—each with a director at its helm. The plan was adopted by e-mail vote.



The following Five-Year Strategic Plan includes the feedback from the board since the October 2010 meeting, the organizational structure approved in November 2010 and any changes indicated by the work of the directors of each group in collaboration with their key volunteers and the executive committee.

Though there are high-level tactics included to illustrate each strategy, the plan does not include the individual work and execution plans of each group.

Section II: The Strategic Plan

To regain relevance, The American Alpine Club (AAC) must change its programs and products and the manner in which they are delivered to the climbing community.

After surveys that included thousands of climbers, interviews of hundreds and months of work by AAC staff and volunteers, a DRAFT Five-Year Strategic Plan was presented to the AAC Board at its October meeting in Yosemite. It was determined that we should move forward with the full implantation of the plan.

The board's input is incorporated in this, final, AAC Five-Year Strategic Plan. The components of the plan—as laid out here—will be our guide over the next five years. The annual budgets and work plans that govern execution will be adopted separately.

AAC Five-Year Strategic Plan

Vision

The AAC unites climbers to advance the climbing way of life

Mission

We provide knowledge and inspiration, conservation and advocacy, and logistical support for the climbing community

Audience

All Climbers

Overarching Strategies

1. Improve the tangible benefits enjoyed by the individual member
2. Expand and grow the effectiveness of AAC outreach and programs at a local level by increasing our support of Sections (Chapters)
3. Regain our leadership position as a comprehensive climbing information resource
4. Employ grants to deliver on our mission to inspire climbers
5. Strengthen our Commitment to Conservation through Community Programs and Direct Action supported by Grants
6. Provide lodging facilities where they are needed at climbing destinations
7. Build a separate strategy for the American Mountaineering Center

The Overarching Strategies

1) Improve the tangible benefits enjoyed by the individual member. Perhaps the most consistent feedback on the DRAFT plan was that we need to make sure the core value proposition of the club—the benefit of membership—is in place early in our execution of this plan. We have already made progress here. Our core tactics include:

- Hire a Membership Director/CFO
- Add a rescue insurance to reimburse members for domestic rescue costs not covered by our Global Rescue benefit
- Provide an array of insurance products that members can purchase at a discount.
- Provide one or more national gear discount programs for members
- Provide local discounts negotiated by AAC Sections (Chapters). **See Sections below**
- Enhance Huts and Lodging as a membership benefit. **See Lodging Facilities below**
- Limit the majority of our grants to members so that our grants are a membership benefit. **See Grants below**

2) Expand and grow the effectiveness of AAC outreach and programs at a local level by increasing our support of Sections (Chapters). Investing in the growth of the AAC grassroots network is the most important and most ambitious of these goals and must be done without sacrificing our prominence as a national organization. The AAC will:

- Hire a Community Programs Director
- Support for current Sections (Chapters)
 - Hire Regional Coordinators
 - First in the Pacific Northwest (done)
 - Two more (or the equivalent) in locations to be determined by the end of 2011
 - More as needed through 2015
 - Deliver Section landing pages and communications tools
- Conduct regular national and regional community leadership conferences and workshops
- Create and implement guidelines for new, smaller AAC Chapters
- Supply systems and toolkits for Sections (Chapters) to easily manage their programs:
 - Social events
 - Conservation work
 - Mentorship programs
 - Local climbing advocacy and public policy

3) Regain leadership position as a comprehensive climbing information resource.

There was a time when the AAC was the leading source of climbing information. Our leadership took the form of the printed *American Alpine Journal* (AAJ) and climbing guidebooks for areas across the United States. Times have changed, and we have not kept up with those times. We are well underway with this goal:

- Hire an Information and Marketing Director under which all of our knowledge resources can be managed and aligned: *The American Alpine Journal*, *Accidents in North American Mountaineering*, Library, Museum, websites, electronic news
- Hire Marketing and Communications Manager
- Build a comprehensive web platform to support all member relations, join and renew functions, store, chapter websites, library catalog and checkout, and all administrative functions (Release date: April 22, 2011)
- Improve content quality and consistency, increase and improve marketing communications, consolidate web holdings
- Launch Digital Asset Management System for library making digital library assets more accessible online
- Add web functionality that allows climbers to aggregate all necessary information about any climbing destination in the world through a keyword search
 - Proprietary: *AAJ* articles, Library assets, AAC partner finder, member-generated trip reports
 - Aggregated from external sources: Route information, photos, video, webcams, lodging
- Add functionality to further support local groups
- Online *ANAM* and print redesign of *ANAM*
- Electronic version of the *AAJ*
- Add web pages that provide best practices for climbing techniques, climbing training, conservation and stewardship
- Stabilize our information foundation—The AAC Library—by making it financially self-sufficient by increasing its endowment in a Capital Campaign

4) Employ grants to deliver on our mission to inspire climbers. Our grants programs have been a huge success. As we deepen our commitment to a local chapter model, chapter endorsements become a key feature in the climbing grants application process. Grants administration will be the responsibility of the membership group. Tactical moves in to support this strategy include:

- Improve the Lyman Spitzer Grant
 - Rename: the **Lyman Spitzer Cutting Edge Grant**
 - Increase award to \$20,000 from \$12,000
 - Change grant application deadline to December 15
- Improve **AAC Mountain Fellowship Grant**

- Phased increase of award to a maximum of \$25,000 (as fundraising allows and in response to demand)
- Improve **Zack Martin Breaking Barriers Grant**
 - Increase funding as fundraising allows
- Maintain **McNeil-Nott Grant**
- Maintain our role in the **Copp-Dash Inspire Award**

5) Strengthen our commitment to conservation through community programs and direct action supported by grants. We empower and rely on our chapters to identify conservation and research needs at the local level and support local action and volunteerism through grants. Grants will be funded by annual gifts, Industry Partner sponsorships, capacity building and endowment funding. While the AAC will become a much less centralized organization, we cannot relinquish the power and reach that our national reputation provides. The AAC must continue to use its reputation, relationships and partnerships to ensure that we protect the places we climb and our access to them. Changes to the program include:

- Hire a Conservation and Policy Director in 2012 or as funding allows
- Establish the **AAC Crag Infrastructure Grant**. The AAC must establish its niche in this space. The AAC Crag Infrastructure Grant builds on our tradition of providing facilities that improve the climbing way of life.
 - Funded immediately to lend resources to our sections as we empower and support them (Award \$25,000 in fiscal 2011)
 - Grant is only available to AAC Sections (Chapters)
 - Grow grant to \$50,000 by 2015
- Combining Fischer and Kellogg grants into one, larger **Fischer-Kellogg Conservation Grant**
 - Make grant available only to AAC members
 - Applicants must have endorsement of an AAC Section (Chapter)
- Position AAC research grants to promote the concept of **Climber Scientists**
 - Continue to operate the **Nikwax Alpine Bellwether Grant**
 - Increase funding of **AAC Research Grants** (Award \$15,000 in fiscal 2012)
- Allocate up to 30% of the Executive Director's time to advocacy and policy work
 - Employ the AAC reputation and that of key members in National policy issues
 - Continue to work with other national organizations to share the burden of work and present a unified front on major issues
 - Deepen our collaboration with the Access Fund
 - Use UIAA to influence international policy

6) Provide lodging facilities where they are needed at climbing destinations. We must position our growing lodging system as both a benefit of membership and a responsibility of and opportunity for the Section or Chapter in which each exists.

- **New River Climbers Campground**
 - Purchase Burma Road property: 40 acres purchased in December 2010
 - Work to sell land to New River National River and develop as Campground
 - Develop alternatives in case the National River is unable to purchase land
- **Shawangunk Gateway Campground**
 - Finalize design and pull permits
- **Grand Teton Climbers' Ranch**
 - Accomplish 2010 Satisfactory Rating (done)
 - Accomplish 10-year contract renewal
- **Eldorado Springs Hostel**
 - Early stages
- **Yosemite Valley**
 - Work with Park on Merced River Plan to expand Camp IV to 80 sites from its current 34 and make substantial improvements to bathrooms
- **Affiliate facilities (AAC member discounts)**
 - Research our current relationships and publish as membership benefits
 - Use AAC Sections (Chapters) to negotiate other affiliate relationships

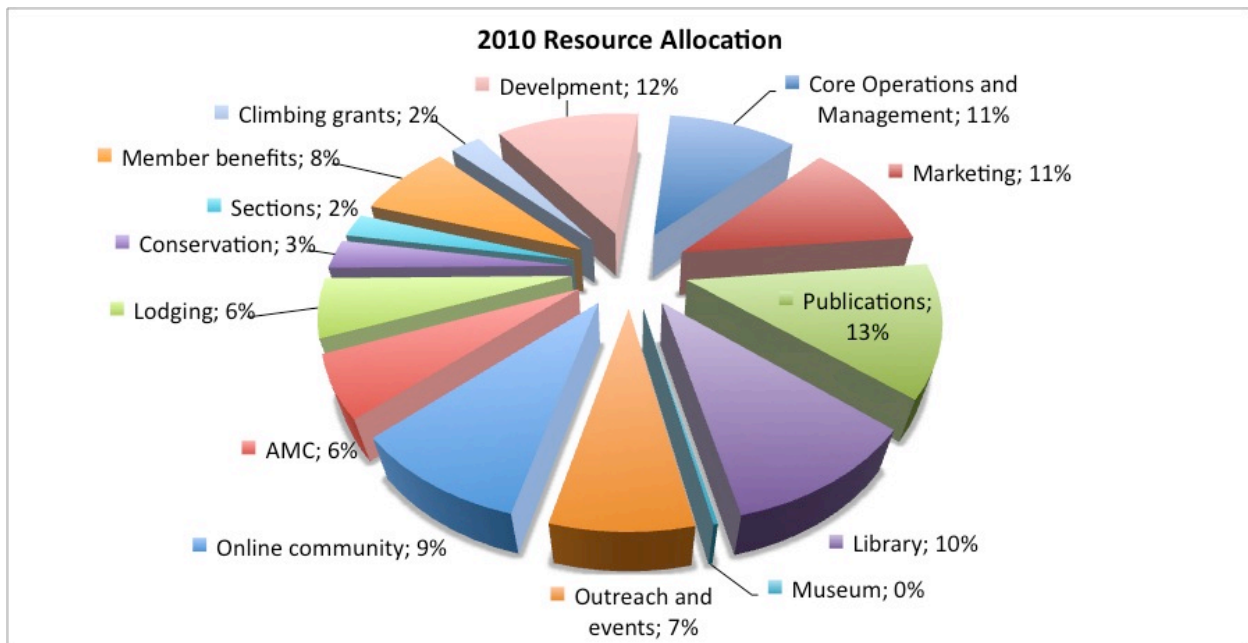
7) Create a separate strategy for the American Mountaineering Center (AMC). The AMC management committee has done an excellent job building a separate strategy for the AMC. Significant accomplishments include:

- Make the AMC staff an independent group that reports to the AMC Management Committee
- Hire a director for the AMC whose goals include revenue generation through space rental
- Heighten the AMC's role as a convener of conferences pertinent to the AAC mission with special attention Conservation and Policy
- Stabilize the Mountaineering Museum with a minimum operating budget and .5 FTE
- Close the Gift Shop
- Continue to host the Mountaineering Museum annual gala **April 9, 2011**
- The establishment of a reserve fund

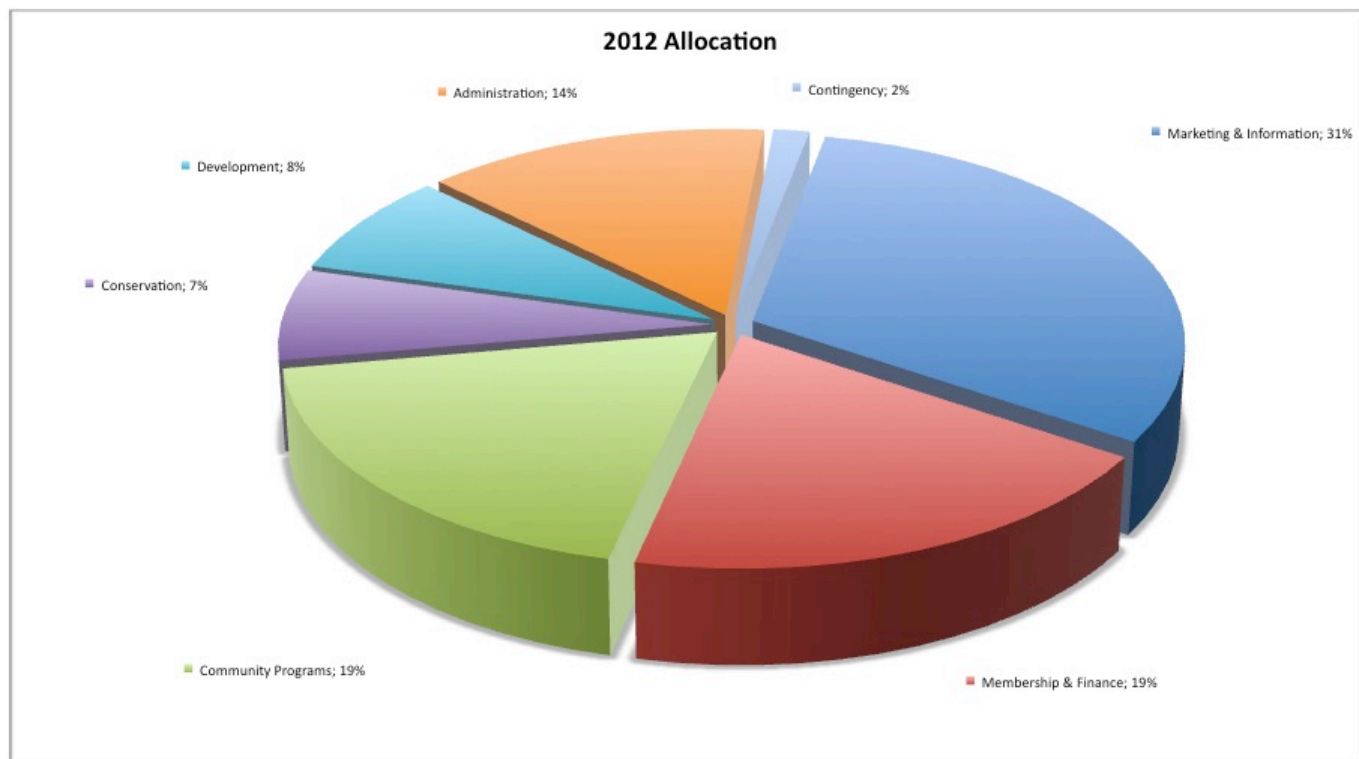
These are exciting times for the AAC. For the first time since the advent of rescue insurance in the early 1990s, we are rebuilding the benefits package for members. The strategies and tactics above come out of a planning process that included interviews, planning meetings and surveys of over 2,000 climbers and members, plus extraordinary, thoughtful input from the executive committee, committee chairs, and staff.

Membership growth is the key measure of our success in this plan. The implementation demands an investment of at least \$250,000. It has the advantage of countering our notoriously “slow to change” reputation and bringing a critical mass of real and symbolic change to the marketplace at once.

Our goal is to take this from a place where programs are in silos and centered in Golden....



...to an organization where similar programs are aligned together and more is delivered through Sections (Chapters). Note that in the 2012 view, the resources devoted to Sections (titled Community Programs) are 19%, up from 2% in 2010.



Summary

While our goals are to devote more of our resources to the AAC mission and become more relevant to all climbers, we cannot succeed without a keen eye on fiscal responsibility. This plan is only sustainable if climbers respond by joining the AAC. Its success will be measured by membership growth.

The seven overarching strategies above should not be seen separately. They each support the others and they are each prioritized so that we make the changes most likely to drive membership growth—and the financial sustainability of the plan—first.

Based on the outreach work that went into formulating these recommendations, significant membership growth revenue should be achieved as a result of implementing these programs. Given the benefits we provide, the AAC reaches a far more efficient scale at just over 15,000 members.

Section III- Structure

The business plans that supported the drafting of the Five-Year Strategic Plan called for a structure that divides the AAC into four major groups:

- Marketing and Information (M&I) with its head the M&I Director
- Membership and Finance with its head the Membership Director/CFO
- Community Programs with its head the Community Programs Director
- Development with its head the Development Director

If the plan is on track in early 2012 and funding allows, a fifth will be added:

- Conservation and Policy

Division Descriptions

Marketing and Information: One of the things that kept marketing from fulfilling our vision in the past is the degree to which it also had to own the monthly, transactional treadmill of membership revenue. This structure frees M&I to deliver our message according to our Strategic Plan and Annual Campaigns without being overburdened by the details of making sure the servers are working, the direct mail has dropped or the postage has been paid.

Membership and Finance: One of your most consistent pieces of feedback on the Plan is that we need improve our membership benefits first. The “Membership and Finance Division” puts fiscal oversight, customer service and membership benefits at the center of its “division mission statement.” We need a group who puts the individual member first and pays attention to the value proposition (benefits) and members (dues revenue). Many of the responsibilities of the people in this division are similar to their jobs in the past. But we require a shift in deliverables, responsibilities and attitude to the customer: AAC members and prospective members.

There remain a number of support needs that this division must fill in order to free other talent within the organization to deliver their best. These support functions have direct impact on the member experience while taking pressure off other divisions. Examples include: *Journal* production and delivery, grants administration, accounting, IT support, phone responsiveness, risk management, and benefits management and enhancement are all necessary for a quality member experience.

Finally, the board made it clear that we must make sure our financial oversight is at its best as we implement this plan, prepare for a major funding campaign and face the inevitable complications that more chapters will present. We have added “Finance” to the division title and “CFO” to this group leader’s title and job description.

Community Programs: Conservation, mentorship, events, local member benefits, and even advocacy all must be delivered in a way that promotes community at the local level whether or not the chapters are in place. This group takes advantage of talent and

experience we already have on staff to move forward quickly to support our current sections and build on the momentum we carry out of the planning process itself. Other staff in this group will be regional coordinators around the country.

Development: The development department moves from a single position to a group with two employees plus consulting to guide our capital campaign. The executive director will continue to play a major role here.

Staff Structure:

