

Good Roads 2.0:

An Analysis of the Impacts of Rail-Trail Organizations
on Strategic Planning, Community-Building and Economic Revitalization

By

Natasha Mihell
B.A. (Hons.), University of British Columbia, 2018

A Thesis Submitted in Partial Fulfillment
of the Requirements for the Degree of
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Supervisory Committee

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Abstract

Friends of Rails to Trails Vancouver Island (“FORT-VI”) seeks to develop a 224km rail-trail corridor from Victoria, British Columbia (“BC”) to Courtenay, BC, with an additional spur from Parksville to Port Alberni. To advance and manage this goal, FORT-VI asked for a comparative analysis of five different rail-trail initiatives that outlines the potential and likely impact, challenges or barriers that stand in the way of developing a rail-trail corridor, and smart practices or successes of similar projects around the world.

Influenced by Bryson’s (2018) strategic change cycle, this paper identifies potential outcomes of rail-trails initiatives across multiple policy areas that include: health, recreation and ecological economics; and land use, reconciliation and governance. The analysis demonstrates that, while FORT-VI’s initiative may be suspended indefinitely due to external influences, there is much information to be gleaned about the value of rail-trails across all policy areas, which can assist FORT-VI in its continued advocacy for a rail-trail on Vancouver Island. Not only can this information support the development of rail-trails like FORT-VI’s Island Rail Corridor, but it can also benefit other areas that are looking to develop rail-trails. Lastly, it can assist various associated actors, such as First Nations in the Vancouver Island area, who may be interested in supporting a rails-trails initiative or learning more about such initiatives in general.

Keywords: rails to trails; ecological economics; Friends of Rails to Trails Vancouver Island; strategic planning; Good Roads; environmental movements

Table of Contents

Supervisory Committee	ii
Abstract	iii
Table of Contents	iv
Acknowledgements	vi
Dedication	vii
1.0 Introduction	1
1.1 Understanding Rails-Trails Initiatives: Background, Issue Statement and Significance of Topic	1
1.2 Research Question, Purpose and Scope	3
1.3 Positionality Statement: Where Do I Stand?.....	3
1.4 Organization of the Report.....	3
2.0 Literature Review.....	5
2.1 Overview of Rails-Trails Research	5
2.2 Similarities and Differences in the Rail-Trail Development Process	6
2.3 FORT-VI Literature	7
2.4 Health, Recreation and Ecological Economics	8
2.5 Land Use, Reconciliation and Governance	11
2.6 Summary: The Story So Far.....	13
3.0 Methodology.....	15
3.1 Ethics Review.....	15
3.2 Methodology	15
3.3 Methods.....	16
3.4 Data Analysis	16
3.5 Strengths and Limitations	16
4.0 Findings: FORT-VI Current State and Situation Analysis	18
4.1 Rails-Trails: A Brief History and FORT-VI’s Governance Structure	18
4.2 FORT-VI: Timeline and Background	18
4.3 Environmental Scan: Issues and Trends	20
4.4 Stake/Rightsholder Analysis	22
4.5 Summary	25

5.0 Findings: Comparative Analysis.....	26
5.1 Otago Central Rail Trail in New Zealand	26
5.2 B.L.T. Rails to Trails Community Trail in Nova Scotia.....	28
5.3 Le P’tit Train du Nord in Québec	29
5.4 The Great Allegheny Passage in the United States of America.....	30
5.5 Alberta’s Iron Horse Trail.....	32
5.6 Main Themes in Conversation	33
5.7 Multi-Parameter Comparison of Each Rail-Trail.....	34
6.0 Discussion & Analysis.....	37
6.1 Answering the Research Question	37
6.2 Unexpected Findings.....	42
6.3 Further Research	42
6.4 Further Strengths and Limitations.....	44
7.0 Options and Recommendations	46
7.1 Next Steps for Friends of Rails to Trails Vancouver Island	46
8.0 Conclusion	51
9.0 References.....	52
10.0 Appendices.....	65

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This thesis could not have been completed without the support and encouragement of Dr. Kimberly Speers. Dr. Speers' leadership and skillset permitted me to grow in many different directions. I am forever grateful to Dr. Speers for empowering me to do the best work, and be the best human, I could.

Finally, I wish to thank Friends of Rails to Trails Vancouver Island for creating space for this thesis to be completed alongside their work. My belief in their work as passionate, on-the-ground game changers, is grounded in the narrative arc of this paper. It has been exciting to learn so much about the far-reaching impact of rail-trails.

Dedication

To dad, for taking me to work to see the trains.

To mum, for encouraging me through my stress tears—especially considering you were writing your own master’s thesis in the room next door.

1.0 Introduction

Rail-trails occupy a meaningful but under-researched space in the field of community development. They are lenses through which to view the changing faces of political, social, environmental, and economic factors (Scherrer et al., 2021). They also offer the potential to redefine community values, enhance quality of life for those in a rail-trail's vicinity, and create space for the ingenuity of the underrepresented. While these initiatives are subject to the financial and intragovernmental constraints of their respective jurisdictions, the lessons learned from individual rails-trails initiatives reveal the extent of their utility and their place in an ongoing conversation around movement and connection.

To situate this topic, this thesis is guided by the needs of Friends of Rails to Trails Vancouver Island (FORT-VI). Created in 2018, this nonprofit organization seeks “to convert the existing rails within the Vancouver Island Corridor north of Langford into a non-motorized (e-bike friendly), multi-use trail” (FVA, 2022), which is referred to as the E&N line or the Island Rail Corridor (hereinafter known as the Island Rail Corridor or the IRC, throughout this paper). Through a comparative analysis outlining the successes and challenges of other rail-trail initiatives, this thesis provides lessons learned and smart practices on how FORT-VI can further explore a financially feasible, politically viable, and comprehensively collaborative strategic framework to accomplish their primary goal. The discipline of strategic planning necessarily underlines the work put into and the work that results from this thesis.

The analysis provides vantage points that reveal different approaches to defining, reaching, and actioning rail-trail development. Taken together, they ideally position FORT-VI to develop a rail-trail corridor that supports the Island Corridor Foundation's aim to “connect and benefit all Island communities and First Nations” (FVN, 2021) along it. As well, they offer information that can help shape the development of rail-trails by other organizations.

1.1 Understanding Rails-Trails Initiatives: Background, Issue Statement and Significance of Topic

Background

On their website, FORT-VI states that it is an environmentally conscious, community-building organization intent upon honouring land and history through the creation of rail-trails (FVI, 2023) and that they have been working on rails-trails initiatives for nearly two decades (FVA, 2022). According to FORT-VI, the envisioned rail-trails are to be sanctuaries of health, nature, and learning, allowing for safe and affordable commuting, increased revenues for local businesses along each new trail, and the opportunity to celebrate Vancouver Island's biodiversity and history (FVI, 2023; FVQ, 2023).

Bartoschek (2023), a prolific author on rails-trails around the world, has identified ninety-nine “railway line cycling paths” in Canada with three additional routes under discussion, including the IRC initiative. Thirteen of these ninety-nine rail-trails exist in British Columbia (Bartoschek, 2022, Railway line cycling in Canada) and if developed, FORT-VI's rail-trail would be the hundredth rail-trail in Canada.

Issue statement and significance of topic

The Island Rail Corridor has not been used for passenger service since 2011 (FVQ, 2023). The Island Corridor Foundation (“ICF”), the nonprofit society to which FORT-VI belongs, “acquired the rail corridor in exchange for tax credits of \$360 million to CPR” in 2006 “with a vision to preserve the entire contiguous [sic] corridor” (FVQ, 2023).

This rail-trail development project has been in the ‘under discussion’ stage for years and FORT-VI is dependent upon the decisions made by the ICF. The ICF’s members “[represent] the Districts and First Nation lands of the Corridor, which manages the rail line, land and assets worth about \$337 million in the public interest” (FVQ, 2023). The diverse perspectives that comprise the board vote to reach decisions about the use of the land upon which the rail-trail corridor sits.

While the ICF and FORT-VI agree on keeping the corridor intact, the ICF does not and cannot support FORT-VI’s initiative (Craighead, 2023, p. 5) as they champion rail services in the corridor. Intragovernmental discord in the nonprofit society, stemming from how the corridor should be used, has posed significant challenges for the IRC. This discord has as much to do with financial feasibility as it does with historical land use disagreements. For example, the IRC exists on unceded Indigenous lands previously owned by the Canadian Pacific Railway.

In February and March 2023, after all non-First Nations members of the ICF board “voted against the motion” (p. 2) for alternative uses for the corridor—i.e., foremost, that it is not used as a railway once again—all sitting First Nations members of the ICF resigned (p. 2). In other words, these five First Nations members disagreed with the corridor reverting to its former purpose and felt they were not being heard. While FORT-VI’s vision is aligned with the First Nations in question (i.e., the nonprofit does not want rail use either, but rather trail use), the organization is also beholden to the ICF as its parent society and the perspectives it represents. This occurs against a backdrop of the province performing a study on the “potential for rail freight” in the corridor (p. 1), as well as “\$18 million [set aside] for further consultations” (p. 1).

Moreover, and having an arguably greater impact, the resignation of the First Nations previously sitting on the ICF board was followed swiftly by the return of land from the federal and provincial government to three First Nations around the IRC (Craighead, 2023; Wilson-M, 2023). This appears to diminish the likelihood of the rail-trail’s development further at least in terms of how it was originally envisioned.

The diversity of needs and desires surrounding the creation of the IRC suggest that this initiative is representative of a wicked problem, or one in “‘a class of social system problems which are ill-formulated, where the information is confusing, where there are many clients and decision-makers with conflicting values, and where the ramifications in the whole system are thoroughly confusing’ (Buchanan, 1992: 15; Rittel and Webber, 1973)” (Earle & Leyva-de la Hiz, 2021). That said, FORT-VI can address the ambiguity and uncertainty of this wicked problem by empathizing, designing and testing solutions in the process of developing a strategic framework (Head & Alford, 2015). The strategic framework will be informed by the lessons learned by other rail-rail organizations, a stake/rightsholder analysis, and a situation analysis of the current and future state of FORT-VI. Lessons learned from FORT-VI’s experience and from rail-trail organizations elsewhere, reveal the benefits, challenges, and areas of value for rail-trail creation and management.

In addition to this research being useful for current and future FORT-VI projects because of the unique dynamics involved (i.e., financial feasibility and historical weight), the value of this paper extends to other rail-trail organizations in Canada and around the world that are interested in establishing similar initiatives.

1.2 Research Question, Purpose and Scope

Research question and purpose

The research question underlying this thesis is: what lessons can be learned from other rail-trail initiatives to help FORT-VI move forward in its goal to establish a rail-trail on Vancouver Island? The primary objective of this paper is to provide information that FORT-VI may use to develop strategies to plan, communicate, and build and sustain relationships in pursuit of a strategic framework in the next chapter of their work. Sub-questions useful in achieving this objective are answered in subsequent chapters:

- What is the current state of FORT-VI? (*chapter 4*)
- How are stake/rightsholders affected in each of the five analysed rails-trails initiatives? (*chapter 4*)
- What can be learned from other rails-trails initiatives to assist FORT-VI in developing its strategic framework? (*chapter 5 and 6*)

Throughout this thesis, the term rail-trail may refer to rail-with-trail or rail-without-trail, but ultimately, it is the product of a path once used as a railway now transformed into a pedestrian-friendly trail. A strategic framework is one that is financially feasible for the rail-trail organization and politically sound internally (i.e., conducive to emergent planning).

1.3 Positionality Statement: Where Do I Stand?

I am a graduate student from the University of Victoria, in the Master of Public Administration program, acting in a consultant capacity with FORT-VI. I pursue this thesis because the idea of transforming an industry-focused initiative (a rail) into something community-oriented and beneficial to this planet's health (a rail-trail) appeals to me. I am interested in pursuing projects that advocate sustainability, reconciliation, and community, and am passionate about supporting nonprofit organizations in achieving their aims.

On that note, I have contributed to the development of several nonprofit organizations: Indigo's Love of Reading Foundation, Valley Therapeutic Equestrian Association, and Heart For Music BC. My experience in these organizations is varied but has given me an appreciation for grassroots work done for community-building ends. I also hold an undergraduate degree in Political Science (Honours) from the University of British Columbia and thus have a grounded understanding of comparative governance and environmental and economic issues. I have worked for Crown-Indigenous Relations and Northern Affairs Canada, and as a literary agent.

Finally, I chose this project because my father worked for Canadian National Railway for thirty-six years. I view this project as a means of continuing this legacy albeit in a novel way.

1.4 Organization of the Report

This report is divided into ten chapters, including its introduction. This first chapter has highlighted the importance of the initiative and familiarized readers with the client. The second

chapter presents a literature review to situate readers in existent literature on rails-trails. This section will also highlight knowledge gaps that will be explored in the later chapters.

The third chapter centers on the methodology and methods guiding this research. The outcomes of all methods used are presented in the fourth and fifth chapters, which showcase findings from the situation analysis and comparative analysis. The sixth chapter includes the discussion and analysis of these findings, and the seventh offers options and recommendations for FORT-VI to use at their discretion, based upon this. The eighth chapter is the conclusion. The ninth and tenth chapters are references and appendices, respectively.

2.0 Literature Review

The purpose of this narrative literature review is to situate this thesis in existing research on rail-trail initiatives. Narrative literature reviews, useful for narrow topics like this one, present an overview of literature related to the topic at hand, allowing the reader various lenses through which to view the research problems presented in this paper (Leenaars et al., 2021). The review includes an overview of rail-trail initiatives, including their impact internationally and nationally, a discussion of the general similarities and differences in the literature around the rail-trail development process, an overview of FORT-VI's literature, as well as general lessons learned around 1) health, recreation and ecological economics and 2) land use, reconciliation and governance.

The 'lessons learned' from other rail-trail initiatives demonstrate not only the breadth of benefits and challenges these initiatives present, but also the interconnectivity of rail-trail organizations, impacting their local, national, and international communities. This interconnectivity also extends across multiple disciplines (Van Riper et al., 2017) including: environmental anthropology, political science, ecological economics, conservation psychology, environmental sociology, landscape architecture, and geography.

Ninety-five central sources form the skeleton of this literature review and the foundation of the thesis entire. These sources were selected from the University of Victoria and University of British Columbia online library databases (McPherson and Koerner, respectively), as well as uncovered in grey sources such as railstotrails.org. Sources were filtered based upon relevance to the status of rails-trails literature, rail-trail development, and strategic planning. Terms used to find relevant literature included "rail-trails" and then "rail-trails" paired or grouped with the each of the following: Canada, ecotourism, sustainability, international, physical activity, reconciliation, policy, and governance.

2.1 Overview of Rails-Trails Research

Scholarship on rail-trails is recent, with the earliest studies about rails-trails appearing in the mid-1990s. These are primarily focused on initiatives in the United States (Siderelis & Moore, 1995; Scherrer et al., 2021). Literature on rail-trails in Canada (Baker, 2001; VanBlarcom & Janmaat, 2013) and around the world in places such as Australia, New Zealand, and Spain (Rovelli et al., 2020; Taylor, 2015; Ventura-Fernández et al., 2017) exists as well, though less systematically and is not peer-reviewed. Scherrer et al. (2021)'s recent comprehensive study on the status and future research of rail trails literature (p. 97) notes sixty-two publications directly exploring the impacts of rail-trails globally. Scholarship on rail-trails is moreover primarily from English-speaking Western countries (Kling et al., 2017, p. 488).

Rails-trails internationally

As of December 2021, the United States had 1785 rail-trail routes and 643 being planned (Bartoschek, 2022, Railway line cycling – United States of America), and over 2000 rails-trails initiatives were undertaken or planned in Europe and Asia (Bartoschek, 2022, Railway line cycling – railway line cycle paths in Europe). In America, rail-trails emerge due to the underfunding of railway lines, once prominently linked to national defense in the United States, but subsequently replaced by other, more popular modes of transportation (Ferster, 2017, p. 1). The lack of literature on rail-trails in Europe (and Asia) (Taylor, 2015) makes it unclear whether European rail-trails emerged for similar reasons. Nevertheless, as New Zealand's OCRT

demonstrates, rail-trails across the globe serve to connect rural communities and may derive from old colonial lines (i.e., railway lines owned by colonial stakeholders) (Department of Conservation, 2019).

Rails-trails in Canada

Canadian academic literature predominantly focuses upon rail-trail initiatives on the East Coast, although there is some grey literature (e.g., news articles) on rail-trails developed across Canada. These are helpful insofar as they allow researchers to understand how often these rail-trails require maintenance or additional assets (CGN-B, 2017; CGN-A, 2018; CGN-K, 2018) or when funding has previously been made available for these projects (Simpson, 2004).

There are also several articles that provide observational information on the value of working rail-trails in Canada. For example, the Boundary Creek Times encourages readers to “immerse [themselves] in a historical experience [they will] not soon forget” on the KVR and C&W trails (BCT, 2021), and Ursula and Terry Lowrey advocate for rail-trails in the Trail Daily Times: “we believe maintaining the Columbia and Western as a Rail Trail is far more sustainable in the long term than conversion into an industrial logging road” (TDT, 2020).

2.2 Similarities and Differences in the Rail-Trail Development Process

Rail-trail literature covers a broad range of topics, including the benefits of rails-trails around transportation, “health and wellness”, access, economic development, and environmental health (USDT, 2021, p. 5). The predominant approach to rail-trail research centers on the usefulness of rail-trails as economic opportunities (Betz et al., 2003; Reis & Jellum, 2012; Oswald et al., 2015; Flink, 2021). All literature acknowledges this aspect as a preeminent factor in rail-trail development.

The evaluative and economics-focused research approach is supplemented, however, by a qualitative dive into the experiential value of rail-trails, specifically as it relates to tourism and service design (Willard and Beeton, 2012). Much of the research also looks at the history of rail-trails and their development, as well as different ways to approach planning and stakeholder engagement. Papers that speak to lessons learned may focus more or less on the planning process or other aspects of rail-trail development, such as maintenance, construction, and risk management (USDT, 2021). The status of rails-trails research has also been the subject of study through papers and literature reviews illuminating knowledge gaps around “heritage and public health” (Kling et al., 2017, p. 488) and revealing what areas could benefit from further research (Scherrer et al., 2021).

The rest of this section focuses on how the literature addresses stake/rightsholder engagement as well as strategic planning, decision-making, and leadership.

Stake/rightsholder engagement

Initiatives vary slightly on how to involve stake/rightsholders in rail-trail development. Jones et al. (2002) states that “stakeholders should be involved through a technical advisory committee or frequent communication via meetings, newsletters, phone calls, and e-mails” (p. iv). Also, Scherrer et al. argues that ongoing (and oftentimes complex) consultations with stake/rightsholders will be necessary to ensuring “prudent policy making” (2021, p. 98). All sources reviewed agree that rail-trail initiatives ought to involve a multitude of stakeholders, with

railroads in some cases remaining “a major stakeholder” that “should be involved the planning, design, and construction” (USDT, 2021, p. 27) of the rail-trail.

The U.S. Department of Transportation (2021) suggests involvement of stakeholders early in the rail-trail development process, as well as in the safety management of the rail-trail. Similarly, Scherrer et al. (2021) highlights Beeton (2010), who indicates that regions can benefit from stakeholder engagement “in rail trails pre-development planning processes” (p. 107). They also claim a “need to further unpack the challenges arising from integrating multi-scalar governance systems in the planning and management of rail trails” (p. 112). Much of the literature acknowledges the lack of research on rail-trail initiatives (Kling et al., 2017; Chatfield et al., 2014; Scherrer et al., 2021)—“there is a significant gap in the academic literature that needs to be explored” (Reis & Jellum, 2012, p. 135)—and acknowledge that initiatives could benefit from further examination of overlapping policy areas, such as “planning/policy/governance and tourism/research” (Scherrer et al., p. 112).

Strategic planning, decision-making, and leadership

In speaking to Peter Harnik’s research on rails-trails, Flink (2021) emphasizes Harnik’s discussion of rail-trail initiatives as the “contributions of public servants, unsung heroes, and forgotten contributors who enabled the movement to succeed”. An initiative’s success thus appears to rely upon the strength of its leadership, as “there is no standard or uniform rail-with-trail development process” (USDT, 2021, p. 1). Beyond this, Scherrer et al. (2021) imply the usefulness of a strategic framework “to successfully lobby for community and government support ... allay concerns about asset management issues surrounding a proposed trail; address adjacent landholder concerns; as well as compete with other community groups lobbying for reinstatement of rail services” (Scherrer et al., 2021, pp. 97-98).

The discipline of strategic planning “[helps] leaders and managers discern what to do, how, and why” (Bryson, 2018, p. 33). It offers forums for wicked problems to be discussed (Bryson, 2018), so that clear direction may be established, and can result in an eventual consensus: an esprit, or deep synergy (Bolea & Atwater, 2016), felt by internal and external stake/rightsholders. Determining the “where you are”, “where you want to be”, and “how you get there” (Bryson, p. 36) of an initiative may see it to success, thus contributing to a strategic framework for FORT-VI.

2.3 FORT-VI Literature

Friends of Rails to Trails Vancouver Island’s approach to rail-trail development involves the study of other rail-trail initiatives, including reports, impact assessments, news articles, and newsletters. These studies focus predominantly upon the economic impacts of rail-trails, especially on tourism in the area, and tourist dollars generated through engagement of rail-trail users with businesses along the rail-trail (PriceWaterhouseCoopers, 2004; Westcoast CED, 2014; Batz, 2021). Gardner Pinfold (2016) states that rail-trails are “recognized for their contribution to the economy and are increasingly viewed as valuable investments for community and tourism development” (p. 1).

There is also some focus on trail construction and maintenance in these reports (PriceWaterhouseCoopers, 2004), as well as lesser attention paid to kinds of rail-trail use, health benefits, and environmental impact (Westcoast CED Consulting Ltd., 2014; Public Sector Consultants, 2019). Methodological approaches in FORT-VI’s literature include surveys

(Gardner Pinfold, 2016), “[relying] on existing information” (Westcoast CED, 2014), economic impact analyses (PriceWaterhouseCoopers, 2004), and evaluation.

Alluded to above, FORT-VI’s literature emphasizes the high amount of tourist dollars generated by trail users, through their use of local businesses, including restaurants and hotels. Taxes collected because of the initiative are shown to have a similar impact (PriceWaterhouseCoopers, 2004). Generally, these reports indicate that revenue will in the long-term bring in greater economic benefit than cost of construction and maintenance through these two avenues of cashflow. Of note: PriceWaterhouseCoopers (2004) also speaks to “fragmented” (p. 3) rail-trails, with parts owned by the Trans Canada Trail and other parts owned by other nonprofit societies, which could contribute to the economic successes and challenges of each rail-trail.

2.4 Health, Recreation and Ecological Economics

Driving the conversation around health, recreation, and ecological economics, is sustainability as it relates to and impacts social and economic well-being. Indeed, Beiler et al. (2015) argue that “interest in sustainable transportation options [is rising]” (p. 509). The conversation around sustainability has grown in breadth with more recent studies and contributes to arguments in favour of the development of the IRC.

Human health, physical activity, and recreation

Much of the related research around human health, physical activity, and recreation covers who uses rail-trails, the reasons why they are used, and their health benefits. Some recurring points of interest include the usefulness of promoting these trails in addressing health conditions, as well as issues around marketing, low education levels and access.

Chatfield et al. (2014) conducted a study on “changes in physical activity behavior following construction of a rails-to-trails facility” (p. 384). This was, at the time and “to [their] knowledge, the first instance in which [physical activity] was assessed prior to the availability of an entirely new rails-to-trails facility” (p. 384). Reed et al. (2011) researched information on the demographics of rail-trail users, under the assumption that “to successfully develop effective interventions to promote rail-trail use, researchers and practitioners alike must first determine the characteristics of who is and is not using the trail, and for what purpose the trail is primarily being used” (p. 540).

Related, Price and Reed (2014) state that those “promoting physical activity on trails should highlight those trail characteristics preferred by trail users including the trails’ convenient location, beauty, and design,” and that “promoting active transportation on trails might be especially useful among those with low education levels” (p. 255). They also emphasize that “future research could examine why trail proximity is an issue for some but not others and, more important, how distance to the trail can be addressed among those for whom it is a barrier” (p. 255).

Adding another author, Vivanco (2013), to the conversation, who speaks to the concept of urban mobility planning, reminds readers of the connection between bicycle (or active) transportation and environmental virtue in North America. FORT-VI’s strategic framework might be informed, then, by the type of transportation most used upon the IRC, and the linkages between environmental virtue and health.

Finally, research on place dependence—or “the psychological bond between individuals and their physical settings” (Wan et al., 2022, p. 1)—has focused on rail-trails, with Moore and Graefe (1994) finding that the “frequency of trail use is most strongly related to [the user’s] age, the importance they ascribe to their trail activity, and how far the trail is from their home” (p. 17). This blend of geography-based reasoning and conservation psychology might influence the repurposing of a strategic framework (and any associated strategic plan) over time.

Environmental health

Literature on environmental health speaks to animal health and the impacts of rail-trails on ecosystems. Animal health is a vital consideration, as rail-trails also impact animal movement. Whittington et al. (2004) address the effects of human-made trails on wolf movement. They mention an “unexpected similarity between trails and roads on wolf movement” (wolves avoid both with the same rigour) and the importance of managing deftly “the density, distribution, and configuration of trails and roads that act as further impediments” around “narrow bands of habitat”. They also point to the need for future research around food availability near and around these trails. As noted in the literature, other animals that could be impacted by the rail-trail include cougars, deer, and bears. Like wolves, black bears that populate Vancouver Island, for instance, may “[cross] high-use roads less often than expected” (Whittington et al., 2004).

According to Howser (2017), rail-trails may not solely impact wildlife negatively, however. They can “afford critical nesting cover, escape cover, and high-quality winter cover for a variety of wildlife species during the year” (Howser, 2017). They may also “form a valuable, natural system that is vital to the daily and seasonal movements of wildlife” (Howser, 2017). Finally, if “these trails [are] not preserved through enhancement projects or other means, they [are] likely [to] be developed for commercial or residential property or intensive agricultural use,” (Howser, 2017), which would damage the ecosystem severely.

The habitat of Vancouver Island has been “profoundly altered” (Bjorkman & Vellend, 2010, p. 1564) in myriad ways since its colonization, most notably due to fires and logging—though its restoration does not require “simply removing human influences” (Bjorkman & Vellend, p. 1567). Rather, Bjorkman and Vellend (2010) emphasize the “necessity of understanding and preserving ecosystem processes, rather than patterns only, [as well as] the need for active management to achieve conservation and restoration goals in many ecosystems” (p. 1567). Issues surrounding animal and environmental health are intertwined with the politics of Vancouver Island (Rolke, 2015).

Ecotourism, or ecological economics in context

Ecotourism, the conceptual confluence of conservation and tourism, has been critiqued since the early 2000s (Stronza, 2019) as a “Western phenomenon [...] inseparable from [...] neoliberalism” (p. 234), which affects animal and plant health variably. Indeed, ecotourism can be, perhaps deceptively, more profitable than environmentally friendly (Stronza, 2019; Karyono et al., 2017).

From the neoliberal perspective, ecotourism has its financial benefits. Adjacent areas impacted by the IRC rail-trail could include, for example, among others: infrastructure, investment, trade, development, and jobs (Lipman in DeLacy, 2014). These areas themselves involve numerous industries that employ many thousands of individuals, and can be capacity-building, particularly for marginalized populations (Lipman in DeLacy, 2014).

Additionally, while it faces some critique, Serra i Serra (2016) emphasizes “sustainable tourism” as having “great growth potential and attractive characteristics for the communities that engage in it” (p. 187). Taylor (2015) reaffirms the benefits of rail-trails for tourism in Australia, New Zealand, and America. Scherrer et al. (2021) suggest that “rail trails [...] act as catalysts for nature-based, eco, and/or agri-tourism” and that they have the “potential to increase outdoor leisure, recreation and tourism activity” (p. 108).

As a middle ground to ecotourism’s favours and drawbacks, Goodwin in DeLacy (2014) shares the idea of “responsible tourism”, which recognizes that “too often sustainable tourism is focused on the environmental, or green, pillar of sustainability to the detriment of other pillars” (Goodwin in DeLacy, p. 143). He further suggests that touring responsibly means taking on “as much [responsibility] as [one] can handle” to “enhance [one’s] own and the destination’s sustainability” and to “develop local [sustainable development goals]” (Goodwin in DeLacy, p. 143) while travelling.

Finally, Connell et al. (2017) highlight a critical area of tension between ecotourism and BC’s primarily resource-based economy. Differing opinions on land use, diversification, as well as “historic and geographic issues” and institutions (Connell et al., 2017) deepen this divide in an area of British Columbia that experiences substantial forest harvesting (Goetz et al., 2015). Industries entangled with the logging industry may be less inclined to support the IRC rail-trail should its development hinder deforestation on Vancouver Island. Likewise, dependent upon one’s employer, whether a nonprofit, corporation, or the province, one is more or less likely to support an ecotourism initiative such as a rail-trail over continued forestry initiatives on Vancouver Island (Connell et al., 2017).

Rural and remote areas

Scherrer et al. (2021) remind us that “[r]ail trails can contribute to economic diversification in rural and regional areas by bolstering a community’s recreational and tourism resources (Beeton, 2010)” (p. 108). Howser (1997) tells us that rail-trails “have helped to revitalize the economies of small and rural towns”. She points out several economic benefits, including but not limited to: “[l]ocal and state governments [benefiting from] the sale of trail passes [...] and the additional income from utility easements along the corridors”; the “creation of new jobs”; “income and revenue” generated from increased patronage at nearby businesses and demand for related services; and decreased vandalism and littering.

There are ways in which rail-trails in rural or remote areas do not benefit local communities. One weakness of the rail-trail network in Andalusia, for instance, is the “lack of a clear identity of the rail trails”, which contributes to trail users’ “confusion and/or dissolution of the synergies to different levels (local, regional, national)” (González et al., 2021, p. 220).

Property values

Hartenian and Horton (2015) speak to the value of properties near rail-trails in their work, finding that there is a correlation between the two, with time being a key factor: “homes within one half mile of a well-established rail trail in Northampton, Massachusetts tended to appreciate more [...] than homes farther than one half mile away from the original 1984 trail” (pp. 20-21). Zhang et al. (2018) found that decreasing the distance between a home and a trail appreciates property value by a significant amount (p. 284).

On the other hand, Kashian et al. (2018) refer to arguments against greenways and multi-use trails for their “impacts on home values, such as excessive pedestrian traffic, crime, noise, dogs, litter, uncontrolled trespassing, and loss of privacy (Asabere & Huffman, 2009)” (p. 161). These concerns are echoed in Corning et al. (2012), as well, in addition to a note on liability. Likewise, in Georgia, USA, rail-trail proximity became an issue for landowners. While they generally “[placed] value on having trails nearby, [they did] not want trails adjacent to, or running through, their properties”. Their “concerns related to privacy, safety, crime, law enforcement response times, trespassers, trash, and disturbance of farm animals by trail users, all of which could negatively impact the value of their property” (Blair, 2019).

Though Kashian et al. (2018) claim these arguments are older than those more recent ones in favour of rail-trail development, it is still worth noting that “some but not all greenways have a positive, significant effect on property values and that the recreation benefits of a trail exceed costs” (Lindsey et al., 2004, p. 69). In other words, properties may experience no benefit, and others may experience negative benefits, depending upon myriad factors outside of proximity to the rail-trail (Lindsey et al., 2004, p. 84-85).

2.5 Land Use, Reconciliation, and Governance

Tourism, sustainability, and recreation as characterized by the subthemes above are subject to policy, politics, and the law. As such, they impact relevant decision-making processes, as well, around property and land use, human and environmental health, and ecotourism.

Property and land use

Policy concerns around rails-trails initiatives prevalent in the literature speak to the tension between public and private ownership of the land on which rail-trails are situated, as well as concerns over the reactivation of rail lines. McGowan (2015) speaks to how rail-trails might be converted to rails-with-trails should reactivation resurface as an issue. To the latter point, FORT-VI notes that “rail with trail is not a good public option” (FVEN, 2022). The former issue, however, is related to land use, and more complicated.

Cook (2014) addresses the Rails-to-Trails Conservancy in the United States—how a Supreme Court decision in the case *Brandt Revocable Trust v. United States*, permitting a landowner to claim the land on which a rail-trail was situated, had “negative implications” (p. 229) for rail-trails across the country. Essentially, development could not realistically proceed given the number of private claims that could now occur on the land on which rail-trails have been developed. Thompson (2015) counters Cook’s argument, stating it “does not necessarily follow from [this case] that there can be no more rails-to-trails conversions”.

Finally, Rovelli et al. (2020) speak to “the urgency to provide analysts and decision-makers with tools able to evaluate each project in terms of its potential benefits and costs for local communities and its capacity to be attractive for users. This [issue],” they state, “can be eventually tackled and solved at national or regional scale, rather than at the local one” (p. 17).

Health and ecotourism

British Columbia already moves toward “a more sustainable system of transportation”, having limited “the use of private transport, especially car use” (Karyono et al., 2017, p. 35). Relatedly, population inactivity remains a key policy issue, particularly in North America (Scherrer et al., 2021, p. 109). As such, policymakers will need to decide the “allocation of economic, technical

and human resources of promoting” the IRC rail-trail (González et al., 2021, p. 221). This is particularly true under the banner of ecotourism, as “latent or manifest conflict can occur at the policy or regulatory level and between conflicting goals within or between different forest functions at the stakeholder level” (Connell et al., 2017, p. 170). In one early study that addressed the tension between ecotourism and the resource-economy, success could only be found by employing “government intervention through a resource allocation policy” (Connell et al., p. 177).

Without a clear understanding around the benefits and lack thereof for property values around rail-trail development, policymaking around the IRC initiative may be impacted (Lindsey et al., 2004, p. 85). That said, “trails generally do not have significant adverse effects” (Lindsey et al., 2004, p. 87). Given the wealth of conversations amidst policymakers around the intersection of property values and trail benefits (Lindsey et al., 2004, p. 82), FORT-VI could benefit from conducting a travel cost valuation method for each community in the rail-trail’s vicinity (Kashian et al., 2018).

Policies around land use will impact the economic, social, recreational, and cultural wellbeing of those impacted by the IRC rail-trail (Scherrer et al., 2021, p. 111).

Policy and governance

Karyono et al. (2017) and Bryson (2018) demonstrate that policy decisions and the strategic plans that work through them are impacted by the degree to which adaptability, in its various forms and levels, is encouraged. Likewise, “functionalising feedback loops between the policy, the regulatory and the multiple systems at play is key to the success of an adaptive policy process” (Karyono et al., 2017, p. 40). This adaptability is further necessitated by our tragic climate narrative, which also asks us to consider how to incorporate vulnerability and resilience (Karyono et al., 2017, p. 42) into the political choices we make. Strategies are helpful because “organizations that want to survive, prosper, and do good and important work must respond to the challenges the world presents” (Bryson, p. 32).

Historical significance and reconciliation

Advocating for pathways more fitting for the contemporary lifestyle is not new. In fact, “urban bicyclists of the late nineteenth century were some of the most vocal proponents of the Good Roads Movement, which led to the paving of thousands of miles of roads” so it was safer and easier to ride bicycles (Chamberlin, 2012, p. 465). This movement belonged, as mentioned, to bicyclists, but more keenly, to the quieter voice: the ‘everyday citizen’.

Individuals like Ann Meredith, quoted in the Christian Science Monitor (Horine, 1988), are indicative of the sentiment established by initiatives like the IRC. The “stillness” and “solitude” she speaks to are byproducts of sustainable, community-focused development, and the historical value of the IRC rail-trail might have different origins than Virginia’s or Maryland’s, but the value is the same. Ann Meredith notes:

Many of these trails, following as they did in many places the lowlands and stream banks, were perhaps corridors for early American pioneers as they moved ever westward. These same trails were later utilized and adapted to railroad beds and served in that capacity for more than a century. Now these trails have again been utilized by a society that seeks stillness and solitude in heavily populated regions (p. 17).

Baird and Smith's (2001) "Ghosts on the Grade: Hiking and Biking Abandoned Railways on Southern Vancouver Island" also speaks to the cultural significance of rail-trails closer to home, and the great wealth of history they could represent once legitimized.

Rolke (2015) further notes that rail-trails, as emblems of connection, can help to bridge communities, but it is vital that all voices are heard. This is the sentiment of Rolke (2015) in a news article speaking to the relationship between rail-trails and reconciliation. Research on the link between rail-trails and reconciliation is seemingly nonexistent for the time being. Nevertheless, as Scherrer et al. (2021) note, the "institutional layout underlying the management of rail trail public land" (p. 111) will determine the answer to the questions: "[w]ho owns the rail trail", and "[w]hat are the key responsibilities of the local, state and national governments in public land management of rail trails"? (Scherrer et al., 2021, p. 111). Determining early on any question of ownership—and indeed, whether the rail-trail is 'owned' at all—will be integral to whether the IRC can act truthfully and meaningfully as a means of reconciliation with the Indigenous communities that reside on their traditional and unceded territories in the vicinity of FORT-VI's rail-trail.

Creating a space for a conversation around Truth and Reconciliation within the jurisdiction of a rail-trail, greenway, and multi-use trail development is precedent setting. By speaking to this junction, this thesis and any strategic framework associated with it further actions the idea of enmeshment presented in Borrows' (2019) story work methodology—"Our enmeshment in unfolding routines and patterns often facilitates greater connections. It builds our stock of shared ideas and resources. Our received conditions can augment our growth and broaden our horizons through mutual aid and participatory structures" (p. 119). This idea, story work methodology, as well as the confluence of Truth and Reconciliation in this space, may present useful solutions if given greater and more detailed exploration by future researchers and practitioners.

Placed parallel to Borrows' (2019) idea that human experiences are inextricably threaded together, the idea of a rail-trail simultaneously entangled with history and the communities on Vancouver Island in the present, bears deep meaning. Honouring the truth in this enmeshment means creating room for it in the rail-trail initiative. As such, an effective strategic framework is characterized, from creation to implementation to maintenance to emergent transformation, by its humility—or the degree to which it values its relationality with its stake/rightsholders (Borrows, 2019, pp. 117-119).

2.6 Summary: The Story So Far

The story of the Friends of Rails to Trails Vancouver Island IRC rail-trail is guided by the eddies of academic disciplines and political movements that are themselves ever-evolving. Factors ranging from land use to ecotourism could impact the social, health, and economic well-being of the IRC's users, surrounding communities, and overall success. These factors taken together affect the development of the Island Rail Corridor and relevant decisions made by those involved with FORT-VI and the ICF. Finally, Scherrer et al. (2021) point researchers in the direction of bridging the work of policymakers and those in the tourism and leisure industries, indicating that changemakers like FORT-VI and the ICF may become part of establishing a regulatory framework for the governance of rail-trails in Canada.

How does this literature review connect to the comparative analysis? Table A discusses the subtextual connections between the findings chapter and the 'lessons learned' here.

Table A: literature review themes and research themes in conversation

<i>Literature review themes</i>	<i>Research themes/questions to consider</i>
<p>Health, recreation and ecological economics</p> <p>Subthemes: human health, physical activity and recreation, environmental health, ecotourism, ecological economics in context, rural and remote areas, and property values</p>	<p>Research themes</p> <ul style="list-style-type: none"> • Strategic planning as a foundation to address these themes; conversely, these themes as the basis for strategic planning • Understanding shifting policy priorities and adaptability through complex strategic and financial obligations • The enmeshment of values and values-based decisions with strategic planning and engagement <p>Questions to consider:</p>
<p>Land use, reconciliation and governance</p> <p>Subthemes: property and land use, health and ecotourism, policy and governance, and historical significance and reconciliation</p>	<ul style="list-style-type: none"> • To what extent are these themes and subthemes addressed by the five rail-trail organizations, if at all? • How does the degree to which these themes are addressed relate to stake/rightsholder engagement and strategic planning, and financial feasibility? Is there any causal relation at all? • Do these ‘lessons learned’ bear the same value as stake/rightsholder engagement and strategic planning-related lessons learned? <p>Note: These ‘questions to consider’ are prompts. They are not necessarily answered in this paper, though they might be considered in future research, and in combination with the information presented in this chapter and the findings chapters in the creation of an emergent strategic plan.</p>

3.0 Methodology

This chapter describes the study's ethics, methodology, methods, data analysis, reliability, and strengths and limitations. Note that the research underwent an ethics review and the ethics certificate number was 21-0221.

3.1 Ethics Review

An ethics review was performed by the University of Victoria Human Research Ethics Board ("HREB") and the author completed the Course on Research Ethics (TCPS 2: CORE 2022). Given the final method chosen for this thesis, the ethics review proved unnecessary but nonetheless provided insight into the research process. Related information around research instruments and documents are included in this chapter and in the appendices for context around further research that could be done by FORT-VI.

As a reminder, the primary research question of this thesis is: what lessons can be learned from other rail-trail initiatives to help FORT-VI move forward in its goals?

3.2 Methodology

This thesis takes a qualitative approach to the research design framework, with the intent being to garner information from the other rail-trail initiatives examined for FORT-VI's use in developing a strategic framework. The specific methodology used in this thesis is a qualitative comparative analysis. A qualitative comparative analysis compares related initiatives to reveal one or more greater truth(s) about all of them. The value of a qualitative comparative analysis, which is "increasingly applied in strategy and organization research" (Greckhamer, 2018) shows the similarities and differences between case studies and offers an opportunity to demonstrate precedent for related initiatives. This approach is also useful for their "orientation toward explaining outcomes, case orientation," and their ability to address causal complexity (Oana et al., 2021, p. 5).

The cases for the comparative analysis are the Otago Central Rail Trail in New Zealand, the B.L.T. Rails to Trails Community Trail in Nova Scotia, Le P'tit Train du Nord in Quebec, the Great Allegheny Passage in America, and Alberta's Iron Horse Trail. The cases were chosen purposively based upon the following: availability of research and relevant documentation, intersection with the interests of Indigenous Peoples, and evidence of strategic planning. They were also chosen to represent the diversity of approaches to rail-trail planning, covering three countries and multiple subgroups within those countries (e.g., Edmontonians, rural trail users, among others). The criteria for comparison are 'stake/rightsholder engagement & strategic planning' and 'economic successes and challenges' across these initiatives. The analysis is placed in context with a situation analysis of FORT-VI and rail-trails in general.

In the comparative analysis, each of the aforementioned organizations is reviewed for their impact and how they fit within the questions: *Why do I exist? What do I want to be? What do I care about?* This analysis provides the basis for discussion and analysis of a potential strategic framework for FORT-VI moving forward, and answers to the research question(s) posed by this thesis. It also provides a springboard for further research into the impacts, successes, and challenges of rail-trail initiatives for multiple stake/rightsholders.

This paper also uses an adaptation of interpretive multi-parameter comparison (Bolbakov et al., 2020), specifically around the following triad: addresses health, recreation and ecological

economics (rating 1 (lowest) to 5 (highest)); addresses land use, reconciliation and governance (rating 1 (lowest) to 5 (highest)); financial feasibility (high/medium/low); and stake/rightsholder engagement & strategic planning (rating 1 (lowest) to 5 (highest)). This approach is both “nomothetic” in that it “is aimed at finding common patterns, dependencies, and laws” and “ideographic” in that it “is looking for unique facts and properties” (Bolbakov et al., 2020, p. 3). The basis for this method is to address the creation of a strategic framework for FORT-VI whilst environing as many key policy areas mentioned in the literature review as possible.

Situation analysis: environmental scan

In this thesis, another approach used was a situation analysis that established the basis for the comparative analysis. A situation analysis allows an organization to determine the “where you are”—i.e., the status of an initiative—before it gets to the “where you want to be”, and “how you get there” (Bryson, 2018, p. 36) of an initiative. It examines the “vision, mission, and goals” of the organization before these are clarified (Bryson, p. 36).

The first findings chapter on the current state of FORT-VI and of rail-trails generally is an expanded environmental scan, which includes a PESTLE (political, economic, social, technological, legal, and environmental) analysis, a stake/rightsholder analysis, and a SOAR (strengths, opportunities, aspirations, results) analysis.

3.3 Methods

The primary method used within the comparative analysis methodology is document analysis. Document analysis is the study of multiple documents online, including academic sources, strategic plans, and organization websites, to compile relevant data. Approximately thirty documents were reviewed and placed into conversation with one another, to paint the larger picture of each rail-trail organization’s strategic successes and challenges. This information was, in turn, placed into conversation with the literature review to provide a more comprehensive picture. Documents reviewed include web pages, academic articles, and new articles.

3.4 Data Analysis

The methodology of this thesis necessitated that the data is analyzed using a traditional narrative (thematic) analysis—more specifically, to “be vigilant for certain patterns” and group these by theme (Held et al., 2019, p. 398). Data is thus coded by theme and subtheme, namely health, recreation and ecological economics (subthemes: human/animal/environmental health, rural and remote areas, property values), land use, reconciliation and governance (subthemes: strategic planning, stake/rightsholder engagement, and eco-development), and financial feasibility.

The narrative analysis is meant to honour Indigenous research approaches, and to nod to the Indigenous communities impacted by any decision made around the IRC. As King (2003) aptly puts it, the “truth about stories is that that’s all we are” (p. 2).

3.5 Strengths and Limitations

The thesis provides a wealth of information on rail-trail initiatives, adding to a relatively under-researched area of knowledge. The information provided here is a useful starting point for FORT-VI and anyone else interested in rail-trails and ecological economics more broadly.

That said, there are many limitations to this thesis. As the client was bound by time and already conducted consultations with Indigenous communities, and as the thesis length would be

extended unreasonably by key informant interviews, focus groups, and a sharing circle, these methods were not chosen for this study. An emergent strategic plan could leave room for this sort of engagement to occur later. Further strengths and limitations are outlined in 7.0.

4.0 Findings: FORT-VI Current State and Situation Analysis

This chapter outlines the history and current state of the Friends of Rails to Trails Vancouver Island (FORT-VI) IRC initiative. It also provides a situation analysis comprised of an environmental scan, stakeholder/rightsholder analysis and a SOAR analysis.

4.1 Rails-Trails: A Brief History and FORT-VI’s Governance Structure

While rail-trails are a global phenomenon, the first idea for a rail-trail in North America was developed in 1960 (RTC-H, 2023) and the first rail-trails in Canada began construction after the abandonment of rail lines by Canadian National Railway (“CNR”) and Canadian Pacific Railway (“CPR”) around the 1980s. The Trans Canada Trail began construction in 1992 (The Canadian Encyclopedia, 2021), much of which is comprised of rail-trails, spanning from the Yukon to the Maritimes.

There are now ninety-nine railway cycle paths in Canada, with many “particularly evident in the south of the coastal provinces” (Bartoschek, 2023). The IRC is one of three planned projects (Bartoschek, 2023) in Canada and has no planned connection to the Trans Canada Trail.

FORT-VI’s governance structure

At the time of writing, the FORT-VI board of directors consists of four officers including president, vice president, secretary, and treasurer/membership, as well as seven members-at-large (FVB, 2023). The makeup of the board of directors is representative of the following regions: Victoria, Cobble Hill, Courtenay, and Nanaimo. The members-at-large represent Port Alberni, Victoria, Qualicum Beach, Duncan, and Comox, with Victoria and Duncan represented twice (FVB, 2023).

The Island Corridor Foundation board of directors has twelve members, “[six] directors represent the Regional Districts and [six] directors represent First Nations” (IRCB, 2023). The ICF’s website shows currently that Comox Valley, Cowichan, Alberni Clayoquot, Nanaimo and the Capital Regional districts are currently represented, as well as a representative Director at Large Regional District. Two First Nations are currently represented on the board: Komoks First Nation and Hupacasath First Nation, in addition to a Director at Large First Nation representative (IRCB, 2023) and these First Nations members are recent additions to the Board since the resignation of the five previous members (Craighead, 2023).

4.2 FORT-VI: Timeline and Background

As noted on their website, FORT-VI is dedicated to the reconciliation process and supports working with First Nations members to provide trail developments that are respectful of their needs. This includes helping create economic opportunities for First Nations along a future trail or re-routing the trail around First Nations land where requested. (FVQ, 2023)

The journey to development of the IRC rail-trail began in 2018 with the founding of FORT-VI (FVA, 2023). In 2022, FORT-VI engaged with provincial partners to determine whether the project could go ahead for funding (Craighead, 2022). Within the last year, the IRC rail-trail was rebranded as the Island Rail Corridor (FVQ, 2023) and did not receive the funding it sought from government.

Throughout the development of the rail-trail, FORT-VI remained “in touch with various First Nations leaders about their opinion of renewed rail service” (FVQ, 2023). There were different

perspectives since “[s]ome First Nations wish to have the rail lands given back to their reservation and others prefer an unbroken corridor.” As noted earlier, “[r]epresentatives from several First Nations sit on the Island Corridor Foundation (ICF) board, which owns the corridor, [...] [and] resigned recently when the board narrowly voted down their motion to look at alternative uses for the corridor” (FVQ, 2023). Given its commitment to reconciliation, FORT-VI’s strategic intentions appear to be at least somewhat at odds with the nonprofit society that governs it. That said: “[i]f sufficient funding ever becomes available to restart rail service, FORT-VI is not opposed to switching the trail to a train line again” (FVQ, 2023).

As of March 15, 2023, the project came to an indefinite halt because “ten acres of land” was returned to the Nanoose First Nation based on a court case filed a month prior. The decision offers a sense of possibility to the Nation, creating opportunities for Nanoose to grow its community in what ways it sees fit (Wilson-M, 2023). On March 17, the Halalt First Nation also filed a court case seeking the return of land (FVNH, 2023).

Evaluation of the Island Railway Corridor report

In 2020, “[t]he British Columbia Ministry of Transportation and Infrastructure (MoTI) engaged WSP Canada Group Ltd. (WSP) to conduct a detailed evaluation of the [current usefulness of the IRC]”, assessing the entire IRC, including the Parksville to Port Alberni spur (Prashaw, 2020, p. 2). Included in this assessment was “the cost to upgrade infrastructure to resume normal rail freight and passenger service” (Prashaw, 2020, p. 2). Transforming the IRC into an eco-trail was not the purpose of this assessment.

The assessment found “that the condition of the Island Rail Corridor was not in compliance with BC Safety Authority Railway Regulations and Rules respecting Track Safety” (Prashaw, 2020, p. 2), and that improvements would be required to transform the IRC into a workable—i.e., with rail—rail corridor once more. In 2020 dollars, to upgrade the corridor to “[support] higher freight and passenger volumes” would cost \$728,778,304 CDN. A commuter rail service would cost \$595,029,867 CDN (Prashaw, p. 5), with costs escalating over the next decade (Prashaw, p. 75). An “Environmental Impact assessment of the Island Rail Corridor was not assessed as part of this project” (Prashaw, p. 78).

The report also listed stake/rightsholders with some level of interest in the IRC initiative:

[First Nations: Esquimalt Nation, Songhees Nation, Malahat Nation, Cowichan Tribes, Lake Cowichan First Nation, Halalt First Nation, Stz’uminus First Nation, Penelakut Tribe, Snunymuxw First Nation, Snaw-Naw-As First Nation, Qualicum First Nation, Hupačasath First Nation, Tseshahat First Nation, and K’ómoks First Nation.

Stakeholders: Island Corridor Foundation, Southern Railway of Vancouver Island, Federal Government, Provincial Government, 5 Regional Districts (Capital Regional District, Cowichan Valley Regional District, Regional District of Nanaimo, Comox Valley Regional District, Alberni-Clayoquot Regional District), 14 Municipalities, General Public, Local Industry, and Technical Safety BC] (Prashaw, 2020, p. 13).

The report built off reports compiled over previous years. A link to these, and the full report addressed above, is available in Appendix G.

4.3 Environmental Scan: Issues and Trends

A PESTLE analysis examines the political, economic, social, technological, legal, and environmental factors of an issue, and highlights the successes and opportunities of an initiative (Thomas et al., 2021). The purpose of a PESTLE analysis is to help decision-makers respond to and understand “the external influences on [an organization] or other form of entity” and to “[evaluate the] impact that the external environment might have on a project” (Christodoulou & Cullinane, 2019, p. 4).

The following analysis was conducted on FORT-VI to identify current political, economic, social, technological, legal, and environmental issues and trends impacting the organization.

POLITICAL

The predominant political issue facing FORT-VI is Truth and Reconciliation and Indigenous interests centering around the fact that the proposed corridor sits on Indigenous land (FVQ, 2023). This issue intersects with the internal politics of the Island Corridor Foundation—namely, that some stakeholders wish to see the corridor turned into a railway once more, and that five First Nations leaders on the ICF recently resigned due to disagreements with other members of the ICF over how the corridor should be used—as well as FORT-VI’s prior engagement with local BC politics (Prashaw, 2020; FVQ, 2023). The latter is captured in FORT-VI’s petition delivered to the BC legislature on behalf of the project (FVA, 2023).

As of March 2023, BC Ministry of Transportation and Infrastructure committed “18 million to allow for future corridor planning involving affected First Nations and regional districts. The funding will also allow First Nations to assess identified concerns such as flooding, access, noise, or safety issues where the corridor crosses their land” (BC Gov News, 2023).

The federal government’s interest in the project is conspicuous insofar as it supports planning and capital projects and provides the Active Transportation Fund (MJL Engineering Ltd, 2023, p. 27). Indeed, both federal and provincial governments have shown interest in promoting policies around active transportation in a province becoming ever greener (Legislative Assembly of British Columbia, 2022, p. 100). The province’s interest extends as well through its Grants Program (MJL Engineering Ltd, p. 28), and municipal interests are most prominent in the City of Victoria and the City of Nanaimo, both of which have pedestrian and cycling plans (MJL Engineering Ltd, 2023, p. 29, 30).

As a matter of interest, FORT-VI’s initiatives span the territories of: the Comox Indian Band/K’omoks First Nation, the Qualicum First Nation, the Tseshaht Band, the Uchuklesahk Band, the Huu-Ay-Aht First Nation, the Nanoose First Nation, the Nanaimo First Nation/Snuneymuxw First Nation, the Halalt First Nation, the Cowichan Tribes, the Iyackson First Nation, the Malahat Indian Band, the Esquimalt Nation, the Songhees Indian Band, the Lekwungen Nation, and the Beecher Bay First Nation/Scia’new.

ECONOMIC

Funding for the IRC is largely dependent upon its political status but this issue also involves whether it should be a rail-trail or rail-with-trail (FVQ, 2023). Indeed, the FORT-VI website discusses the possibility of transforming the corridor into a rail-with-trail path but insists the costs would be great. On the other side of the budget are the economic benefits from the trail, including income from tourist dollars. FORT-VI shares the economic benefits for Vancouver

Island through those using the IRC, and these benefits are backed by studies further explored in the literature review (FVQ, 2023). FORT-VI is also endorsed by cycling companies, a lodge, and several local businesses (FVE, 2023).

A note on cost

Building the rail-trail as a trail beside the rails in 2020 is expected to cost (based upon like cost in the Capital Regional District): \$377 million (Langford to Courtenay) + \$145 million (Parksville to Port Alberni) = ~\$522 million CDN (FVQ, 2023).

Building a new, upgraded commuter rail-line based on the 2020 report and 2020 dollars, at peak efficiency is expected to cost: ~\$729 million CDN (Prashaw, 2020, p. 5, 75)

As of April 2023, FORT-VI had a feasibility report prepared for it by MJL Engineering Ltd., Burnaby, BC, stating that total cost of the rail-trail, as trail on railbed with rails removed, would be: ~\$172 million CDN (MJL Engineering Ltd., 2023, p. 39).

SOCIAL

One of FORT-VI's greatest claims around economic impact also touches upon social impact and this is the IRC's ability to bridge communities throughout Vancouver Island (FVQ, 2023). In addition to bringing together local and non-local users, the rail-trail elicits the support of environmentally-oriented groups interested in the preservation of the corridor, and provides health and recreational benefits for residents, as is elucidated in the literature review (FVQ, 2023).

TECHNOLOGICAL

There are two prominent technological aspects involved in rail-trail development, the foremost being press releases, marketing campaigns, and other uses of media necessary for the survival of the rail-trail initiative. The latter is the use of technology to improve use of the rail-trail, through analytical tools such as counters. This is further explored in the comparative analysis.

LEGAL

FORT-VI is bound by bylaws and the ICF, as it is part of the nonprofit society, and by the precedents set by the Truth and Reconciliation commission. The organization is also bound to municipal bylaws as they relate to the IRC, such as tree replacement bylaws (Capital Regional District, 2022) and railway development (Government of British Columbia, n.d.), and future and current legislation related to the economic viability, transportation and infrastructure, of Vancouver Island (BC Gov News, 2023).

ENVIRONMENTAL

Eliminating carbon emissions remains at the forefront of FORT-VI's commitment with this project (FVQ, 2023). Maintenance of the rail-trail is an ongoing issue and will depend upon how much of the IRC is able to be developed.

Examining who has interest in each of these factors should elucidate the complex nature of the initiative, as well as provide the discerning reader with some understanding of where to begin when addressing the creation of a strategic framework for FORT-VI, or any similar rail-trail initiative.

4.4 Stake/Rightsholder Analysis

The purpose of this analysis is to provide the reader with a general understanding of how many players are involved in such an initiative and in what capacity. Table 1 is a simplified participation planning matrix. A participation planning matrix is a planning tool that examines engagement across “a spectrum of levels of public participation and the strategic management functions”, “[prompting] planners to think about responding to or engaging different stakeholders in different ways over the course of a strategy change effort” (Bryson, 2018, p. 366). The following analysis highlights seven key stake/rightsholders and identifies their interests, how they would potentially evaluate FORT-VI’s performance, and notes any other pertinent information. These seven stake/rightsholders are pulled from Table 2 (Appendix F), which showcases a non-exhaustive list of stake/rightsholders impacted by FORT-VI’s initiative.

Table 1: participation planning matrix

Stake/rightsholder	Which stakeholders/rightsholders to approach by which means:					
	Ignore	Inform	Consult	Involve	Collaborate	Engage
Strategic Management Function or Activity						
Lekwungen Nation						X
City of Victoria					X	
Destination BC Corp.		X				
Rails to Trails Conservancy			X			
Chemainus Valley Historical Society			X			
Nanoose First Nation						X
City of Parksville				X		

Table 1 results

Table 1’s seven stakeholders/rightsholders are external community stakeholders/rightsholders. These stake/rightsholders are grouped further based upon the categories defined by the literature review. The following list explains the reasoning behind the table above:

- Whom to Involve, Collaborate, and Engage With, and Why:**

The Lekwungen Nation, City of Victoria, Nanoose First Nation and City of Parksville are directly impacted by the IRC rail-trail, as it passes through their respective jurisdictions. They therefore have social, environmental, and economic interest in the rail-trail. Impacts on physical health, economic wellbeing, and reconciliation will be significant for these stakeholders/rightsholders, and for this reason, each will require a higher degree of participation, whether through Involvement, Collaboration, or Engagement.

- Additionally, these organizations might evaluate FORT-VI's performance based primarily upon the economic prosperity brought to them via the IRC. They might also evaluate FORT-VI's strategic framework based upon how their members are impacted under the other criteria mentioned above: improved social and environmental conditions and reconciliation efforts. This is the case especially with Nanoose First Nation, as seen through the recent court case and verdict.
Whom to Inform and Consult With, and Why:
- Destination BC Corp. might have interest in the rail-trail insofar as it could boost tourism in the province, and so at the very least, it would be useful to inform them of the development of the IRC. Destination BC might evaluate FORT-VI's strategic plan and the subsequent IRC rail-trail on how much tourism and tourism dollars the initiative would generate for the province.
- The Rails to Trails Conservancy might have an interest in the project as this organization promotes rails-trails initiatives in the United States and might have information to offer on how best to go about developing them in Canada. It might therefore serve this initiative well if they were consulted. The Conservancy would have no real requirement to evaluate FORT-VI's strategic framework, plan, or performance, except to compare it to initiatives the organization has undertaken in the United States.
- Consulting the Chemainus Valley Historical Society might offer information on what historical sites to promote along the rail-trail, and generally how best the rail-trail can be utilized to connect users to these sites. It would evaluate FORT-VI's performance based upon how well a strategic plan ensured historical sites in the Chemainus Valley were promoted.

NOTE: Both Table 1 and Table 2 were developed prior to the decision to return land to the Nanoose First Nation. They remain unchanged regardless and should be examined in the context of that decision. In a liberated structure, however, stakeholder mapping and stakeholder analysis continues to be developed alongside an emergent strategic plan and is updated on a regular basis. For this reason, this table would benefit from being updated as the initiative develops.

SOAR model analysis

A situation analysis allows an organization, no matter its size or function, to ground itself in a holistic understanding of where it has been, where it is, and where it is interested in going (Bryson, 2018). Strengths, weaknesses, opportunities, threats (challenges), impacts, influences, goals, aspirations form a lens through which planners can understand and manage internal and external needs, contexts, and environments (Bryson, 2018). Analyses like SOAR provide opportunity to develop justifications for an organization's actions (Bryson, 2018, p. 181), improve cohesion, clarity, and creativity between people and ideas (Bryson, 2018, p. 157), and generate integrative solutions (City of Edmonton, 2017).

Documents used to conduct the following analysis included: all cited pages on FORT-VI's website, most notably FVA, and Bryson (2018), in combination with other sources used in the construction of this thesis. The latter include news articles such as Wilson (2023) and Wilson-M (2023), and reports like USDT (2021).

STRENGTHS: WHAT CAN WE BUILD ON?

- FORT-VI has developed an initial plan for “finding a path forward” (FVA, 2022) that has set out the purpose of their next initiative in detail.
- FORT-VI’s passion for rail-trail development is clearly demonstrated on their website and through their letter writing initiative visible there.
- FORT-VI continues a long tradition of rail-trail development that is echoed by similar organizations around the world.

ASPIRATIONS: WHAT DO WE CARE DEEPLY ABOUT?

- With the development of a strategic framework and plan, the most obvious aspiration is the establishment of the IRC rail-trail. But beyond this, FORT-VI hopes:
 - To boost social, environmental, and economic wellbeing across Vancouver Island.
 - To become leaders in the areas of sustainable development and reconciliation on Vancouver Island and in British Columbia.
 - To establish the foundation of a framework for governance for rail-trails in British Columbia and Canada.

OPPORTUNITIES: WHAT ARE OUR STAKE/RIGHTSHOLDERS ASKING FOR?

- Stakeholders/rightsholders seek a project that will bring them meaningful social, environmental, and economic benefits.
- Stakeholders/rightsholders demand that the project recognizes the leadership and work of Indigenous Peoples on Vancouver Island.
- Stakeholders/rightsholders seek a balance between public and private land use and ownership where all parties benefit.

RESULTS: HOW DO WE KNOW WE ARE SUCCEEDING?

- An emergent strategic plan that excites and wins approval of members of FORT-VI, stakeholders/rightsholders, potential donors, relevant government officials and media.
- Buy-in from all stakeholders/rightsholders who have been involved in, collaborated with, or engaged in the IRC rail-trail initiative.
- A substantial increase in funding for this project.

SOAR summary: moving forward on a strong foundation

There is an extensive amount of work already put into the development of FORT-VI’s strategic framework, though it exists at this time in the form of expertise and/or is attached to a variety of sources. It will be beneficial to bring all these sources together to work with the proverbial jewels that FORT-VI already has—and to expand upon the work already done.

Much of this work is reconciliatory, forward-focused, and partner-focused, which lends itself well to the framework’s emergent aspects. The more involvement FORT-VI makes space for when developing its initiative, without losing the IRC’s integral vision, the more buy-in they are likely to receive. Finally, the framework’s success or lack thereof may contribute to other public policy-related issues, academic and practical, that will support the development of rails-trails research well beyond FORT-VI’s initiative.

4.5 Summary

Friends of Rails to Trails Vancouver Island's IRC involves many different stake/rightsholders with interests across myriad policy areas. The strong vision guiding the development of the IRC is dependent upon relationships with each of these stake/rightsholders, and a participation planning matrix can guide how to approach these.

General observations

- Rail-trails occur globally and seem to be a phenomenon of a dissipating colonial embrace on some nations—and a related embracing of the natural, grounded, and local. Rail-trails in North America appear to have started in the 1960s, with most literature on Canadian rail-trails pointing to development in the 1980s.
- Most of the rail-trails in Canada belong to the Trans Canada Trail. FORT-VI could be the hundredth rail-trail in Canada.
- An environmental scan of FORT-VI reveals it is managing issues across policy areas, and there are various lenses through which to approach each of these issues.
- FORT-VI's interest in developing the IRC has been halted after being confronted by multiple First Nations' land claims. Vancouver Island being resource-rich, unceded territory, sees that what FORT-VI intends to do with the IRC is part of the larger provincial—and perhaps national and international—narrative fabric.
- FORT-VI's initiative has many stake/rightsholders. Engagement with stake/rightsholders external to the initiative might provide useful information as to how to approach issues identified in the environmental scan. Further stake/rightsholder analysis is useful when developing an emergent or liberated strategic framework.
- The predominant 'opportunity' for FORT-VI exists around engagement with Indigenous Peoples. Aspirations around social, environmental, and economic factors are strong, but without Truth and Reconciliation as the primary focus, the project appears to fail to account for a great majority of its rightsholders.
- The "where you are" and "where you want to be" (Bryson, 2018, p. 36) aspects of creating a solid strategic framework seem to rely heavily on 'who you know'—i.e., building relationships (with external stake/rightsholders, in this case) is vital to the success of the initiative, and therefore to the success of FORT-VI's strategic framework.

5.0 Findings: Comparative Analysis

The five rail-trails explored below include the Otago Central Rail Trail in New Zealand, the B.L.T. Rails to Trails Community Trail in Nova Scotia, Le P'tit Train du Nord in Quebec, the Great Allegheny Passage in America, and Alberta's Iron Horse Trail. These regions were chosen out of hundreds based upon their unique cultural impact and to explore how different political communities impact rail-trail development. Three are Canadian, as FORT-VI is also based in Canada, and more than one prioritizes Indigenous involvement, which is one of the key factors to FORT-VI's development as well.

Within each section, there is an overview of each rail-trail including an examination of its strategic plan and a discussion of the impact of each rail-trail as related to the confluence of disciplines described in the literature review. The chapter also highlights general observations on the similarities and differences between these rail-trails.

5.1 Otago Central Rail Trail in New Zealand

Overview

The Otago Central Rail Trail ("OCRT") is a "popular long distance recreational trail" (Taylor et. Al, 2019, p. 80) or "line attraction" (Taylor et. Al, 2019, p. 82), designed as an off-road route for bicyclists. At 152 kilometers in span, the OCRT was New Zealand's "first Rail Trail and original Great Ride" (OCRT, 2023) built around a railway line once used to "boost economic progress" among "farmers and orchardists" in the region (OCRT, 2023). Planning for this "tourism product" (Reis & Jellum, 2012, p. 141) began in 1988 (Taylor et al., 2019, p. 85).

Strategic plan publicly (and easily) accessible: Yes.

Stake/rightsholder engagement & strategic planning

Examining the OCRT's long-term strategic plan from 2011 reveals that the rail-trail impacts many of the policy areas addressed in the literature review. Several key words appear in OCRT's vision: heritage, community/communities, and participation, among others (OCRT-SP, 2011). The plan is said to have "emerged from a consultative process designed to encourage stakeholder and community participation" (OCRT-SP, 2011) with a focus on management and marketing for the rail-trail in the years to come. The OCRT remains part of New Zealand's "tourism strategy" (Karyono et al., 2017, p. 53) and an "example of ecotourism" (Karyono et al., p. 187).

Taylor et al. attribute momentum gained by this project to the interaction between an area manager generating support for the rail-trail within New Zealand's Department of Conservation ("DOC") (Taylor et al., 2019, p. 85). This "visionary program manager" (p. 85) was able to garner enough support to build a small team within the DOC, which eventually led to the establishment of the Trail Trust in 1994. Without the Trail Trust, the Otago Rail Trail would likely not exist at all (New Zealand Government, 2023; Taylor et al., 2019, p. 85).

Economic successes and challenges

The OCRT saw a "rapid growth in visitor numbers" throughout its "initial phase of development", remaining steady at 14 000, excluding short-term visitors or commuters, from 2011-2018 (Taylor et al., 2019, p. 86). Contributing to this from 2003 onward was the influx of "hospitality services, bike hire facilities, itinerary planning, bus shuttles from gateway cities

(Dunedin/Queenstown) and luggage transfer services along the Trail” (Taylor et al., 2019, p. 86). Later success, as measured in visitor satisfaction, of the trail is attributed to:

- “the metamorphosis of bike hire companies that serviced the Trail into fully fledged tour operation businesses” (Taylor et al., 2019, p. 86).
- “the migration of couples into the area seeking a lifestyle change from their busy professional lives in major urban centres” (Taylor et al., 2019, p. 86).

Despite the rail-trail’s popularity, it met financial strain in its later years. After 2009, the OCRT’s governance structure transformed from “what was predominantly a duopoly” to a “multi-stakeholder coalition” (Taylor et al., 2019, p. 87), while at the same time facing external pressures from other cycling trails introduced around the time of its promotion. These stakeholders, presently including six official ‘stakeholders’ and six “individuals, groups, or businesses” that give to the trail (OCRT, 2023), “were getting no say regarding its key functions, marketing, and future direction” (Taylor et al., 2019, p. 87). Communication or the lack thereof impacted how the rail-trail was marketed, eventually leading to the “creation of an OCRT governance group in 2013 and the establishment of a body to oversee the development of a common and consistent approach to marketing the Trail” (Taylor et al., 2019, p. 87). This oversight body was seen as “a maturing of the Trail and a key to its long-term success” (Taylor et al., 2019, p. 87).

Externally, economic impact translated into environmental impact and vice versa for stakeholders, as well. Karyono et al. (2017) “[use] GDPs to explore the economic footprint of [the OCRT]”, asserting the following:

although the OCRT has been claimed by the New Zealand government as a successful sustainable tourism project, in a best cost assumption for using renewable resources for environmental remediation (first scenario) 43.6 % of total OCRT GDP must be spent to restore the environment damaged through development of the OCRT. Moreover, again using GDPs, but combining it with current renewable energy costs, this study shows that currently the OCRT is not sustainable. (p. 68)

Regardless of the rail-trail’s level of sustainability, New Zealand’s Department of Conservation “spent six years and more than \$850,000 preparing, upgrading and restoring the closed railway and related historical heritage (including 60 historical bridge and 3 tunnels) and infrastructure, which are now viewed as one of the main attractions for OCRT visitors” (Burns and Corbet 2007)” (Karyono et al., 2017, p. 190). It is considered “indisputably a significant sustainable product for the tourism industry of the region” (Reis & Jellum, 2012, p. 143). The ecological footprint of buildings along the OCRT has been examined (Mahraivan, 2017) alongside its environmental and economic viability—that it remains in the public eye reveals its impact on the communities it reaches.

Summary

The rail-trail, like its railway predecessor, connects many local communities in its area that would otherwise remain isolated. Locals and users of the rail-trail place great value on the encounters they have with history along it, like the “iconic Wedderburn Goods Shed” or the Poolburn lineman’s hut (Department of Conservation, 2019). In effect, communities that might otherwise be cut off economically and culturally from each other become fundamental to the

experience of the rail-trail and the rail-trail, at least in some ways, improves the financial health of each community it touches (Department of Conservation, 2019; Taylor et al., 2019).

5.2 B.L.T. Rails to Trails Community Trail in Nova Scotia

Overview

The Beechville-Lakeside-Timberlea Rails to Trails Community Trail (“BLT”) is a smaller rail-trail stretching thirteen kilometers across Nova Scotia, across the “Mi’kma’ki, the ancestral territory of the Mi’kmaw People” (BLT, 2023), and is part of Nova Scotia’s 110km Rum Runners Trail. The BLT is a multi-use rail-trail and incorporated in late 2020 by “founding members ... Catherine Klefenz and Lindsey Gates” and managed by volunteers in the area (BLT-A, 2023). The B.L.T. Rails to Trails Association is registered provincially as a nonprofit organization (BLT-A, 2023). Since 2021, the BLT has also been part of a much larger trail network in the Trans Canada Trail (“TCT”)—itself 28 000 kilometers long (TCTrail, 2023).

Strategic plan publicly (and easily) accessible: Partially.

Stake/rightsholder engagement & strategic planning

On its website, the BLT Association describes six objectives related to: access to recreation, security, connection with nearby trails and similar volunteer organizations, and to “enhance local tourism and economic development in the local region” (BLT-A, 2023). As an extension of the Trans Canada Trail¹, the vision, mission, and values of the BLT must interplay with that of the grander trail. The TCT envisions “building on the achievement of connection” by inspiring Canadians and visitors to embrace the outdoors, “the diversity of our land and people, to enhance their health and well-being, and to share their stories” (TCT-SP, 2021, p. 2). Its mission is grounded in the idea of partnership (or relationality), and their plan rests on “six strategies for success” (p. 3).

To sustain itself financially, the BLT has relied upon a mix of governmental and nonprofit organizations: the “Trans Canada Trail, Nova Scotia Department of Community, Cultures, and Heritage, Halifax Regional Municipality, St. Margaret’s Bay Rails to Trails, Safety Minded ATV Association, and [the] ATV Association of Nova Scotia” (BLT-AGM, 2022, p. 5) for funding and support. In 2019, the BLT association received \$12 000 after Nova Scotia’s government announced \$972 000 worth of funding for trail development aimed at “[helping] promote a healthy and active lifestyle” (Al-Hakim, 2019). Funding occurred through a provincial grant program supporting twenty-nine (at the time) organizations on the local level.

Economic successes and challenges

The BLT is characterized by its relative newness, its relationship with the Mi’kmaw, and its position as an extension of the Rum Runners Trail and the Trans Canada Trail.

As part of the Destination Trails’ two decades-long “collaborative effort of Rails to Trails conversions involving dozens of municipalities and community based [sic] volunteer trail organizations ... to develop a network of trails that showcase the best Nova Scotia has to offer by way of history, culture, scenery, hospitality, music, food and beverage” (Destination Trail, 2023), the BLT represents a small piece of a greater tourism strategy. Its website launched

¹ Kettle Valley Rail (KVR) and Columbia & Western Rail Trail in British Columbia are presently joined with the Trans Canada Trail (BC Rail Trails, 2023).

in 2021, around the same time as the BLT association formed relationships with, for example, the Trans Canada Trail, Loblaws, and Coca Cola, the latter as of 2021 (BLT-AGM, 2022, p. 5). As such, the way the rail-trail was marketed, and therefore transformed as a tourism product, coincided with its newfound financial priorities and freedoms (or lack thereof).

Funding for the rail-trail significantly increased from 2020 to 2021 thanks to the BLT's partnership with the stake/rightsholders mentioned above, though the association's expenses still outweighed their revenue by just over \$3000 (BLT-AGM, 2022, p. 10). This is in part due to the investments made along the trail, even with the "significant increase in trail usage" (BLT-AGM, 2022, p. 4) brought by the global pandemic. Annually, the trail lost money since at least 2020, though they claim a "strong financial position" (BLT-AGM, 2022, p. 2).

Summary

Whether or not its financial position could be stronger for its needs, the BLT association's focus is on connection and community-building, through its connection with the Mi'kmaw (the BLT sits adjacent to multiple residential areas upon the Mi'kma'ki) as well as other groups and individuals within the municipalities along the trail:

we honoured some lifelong volunteers with plaques and reflected on our country's horrible dark past. We did celebrate International Trails Day with a private trail blessing by a Mi'kmaq Elder and did a virtual International Trail Day celebration by giving away prizes courtesy of Coca-Cola Canada. (BLT-AGM, 2022, p. 4-5)

Members of the organization are keenly involved in the culture and community of their region, responding with action to requests received from those that use the trail. In 2022, they worked with community members to "[right] a wrong" (p. 4) and ensure that the name of a sign along the trail reflected greater historical accuracy. The association seeks to "acknowledge the land that we enjoy, educate users on historic Indigenous information, and be a partner in Canada's reconciliation with the Mi'kmaw" (BLT, 2023). This is aligned with the vision and values of the Trans Canada Trail.

5.3 Le P'tit Train du Nord in Quebec

Overview

Le P'tit Train du Nord is 234 kilometers in length, and in addition to walking and cycling, boasts areas for cross-country skiing and snowmobiling (PTN-A, 2019). It crosses twenty-six municipalities and six regional county municipalities, provides services such as microbreweries, campgrounds, and showcases thirteen historic railway stations.

Strategic plan publicly (and easily) accessible: Partially.

Stake/rightsholder engagement & strategic planning

Le P'tit Train du Nord is run by a nonprofit organization of the same name, comprised of six primary team members, sixty volunteers, and twenty patrol officers (PTN-T, 2019). It also has a board of governors and six regional county municipality partner cities. The mission and vision of Le P'tit Train du Nord is twofold: offering "residents access to high-quality transportation and leisure activities" and "allowing for management of a major tourist attraction generating significant economic benefits for the region" (PTN-A, 2019). While it focuses on drawing attention from both local and visitor economies, this rail-trail stresses benefits for residents in the region primarily. Nearly 50% of its users are residents (PTN-Y, 2019).

The most recent annual report for this rail-trail is from 2018, after the organization renewed its mandate (PTN-R, 2018, p. 43). During this year, in addition to significant funding from Desjardins (PTN-R, 2018, p. 14), Le P'tit Train du Nord received grants from FARR, Trans Canada Trail, Living Lab – Ouranos, Canada Summer Jobs, Concertation pour l'Emploi, and SAAQ via the Association de Réseaux Cyclables du Québec (PTN-R, 2018, p. 43). The organization also tabled a \$25 million investment plan for 2019, which addressed revitalizing the trail, especially signage, with a focus on security (PTN-R, 2018, p. 4).

Economic successes and challenges

A significant focus of Le P'tit Train du Nord's funding was the use of technology to mark the route and improve maintenance of the rail-trail (PTN-R, 2018, p. 8). Additionally, among other acts taken in an overhauled strategic plan, the association hired a consultant to determine how to improve visitor numbers for shopping along the rail-trail (PTN-R, 2018, p. 9) and created merchandise with its rebranded logo (PTN-R, 2018, p. 20). It also maintains a media strategy and hosts numerous events on the trail (PTN-R, 2018), and pays special attention to celebrating its patrollers—an extension of its interest in safety and security on the rail-trail (PTN-R, 2018, p. 16).

Summary

The most conspicuous aspect of Le P'tit Train du Nord is the cohesiveness between its well-funded marketing strategy and general positive response from the public. Le P'tit Train du Nord stresses that teamwork is “key to providing a high-quality park to visitors” (PTN-T, 2019), and indeed, many responses to the park are positive—with the predominant problem being security at one of the route's parking lots (Tripadvisor LLC, 2023). The organization states that “56% [of users] come for road cycling ... Beauty of the surrounding landscapes and network quality come second in respondents [sic] motivations” (PTN-Y, 2019).

While its users may be primarily focused upon health and fitness, having previously belonged to Canadian Pacific Rail, Le P'tit Train du Nord provides access for residents to significant aspects of the region's heritage, as well (Dumas-Jasmin, 2017). The rail-trail acts as a “concrete [action]” to “[preserve] the collective memory in localities” (Dumas-Jasmin, 2017, p. 41). This is a priority as it passes through a “cradle of rich cultural heritage” (p. 38) and “raising awareness among decision-makers and municipal employees, who are key players in this movement [of preservation], remains a major challenge in the coming years” (p. 41).

5.4 The Great Allegheny Passage in the United States of America

Overview

At around 241 kilometers, the Great Allegheny Passage (“GAP”) connects Pennsylvania to the District of Columbia (Campos Inc., 2009; GAP Trail Conservancy, 2023), linking numerous small cities along the way. Creation of the rail-trail began in 1978, and it has boasted “hundreds of thousands” of visitors since 1986 (GAP History, 2023). It is managed by the Great Allegheny Passage Conservancy, a nonprofit organization founded in 1995 as the Allegheny Trail Alliance. As with other smaller rail-trails, “the GAP is maintained exclusively by local residents among [its] jurisdictions” (GAP-A, 2023).

Strategic plan publicly (and easily) accessible: Partially.

Stake/rightsholder engagement & strategic planning

The GAP Trail Conservancy conducted economic impact reports in 2008, 2012, and 2015 (GAP-R, 2023). From 2015 to 2021, it also conducted “analyses of trail usage patterns” based upon counter data (GAP-R, 2023). While the GAP Trail Conservancy does not have a visible (public-facing) strategic plan, its most recent economic impact report indicates that it values connection between tourists and local businesses even more than tourists’ experiences on the trail. The rail-trail’s capacity as a “recreational treasure (GAP-E, 2023, p. 5) is highlighted alongside its value to the local communities it graces.

After “engaging ... a consulting firm” in 1997, the GAP Trail Conservancy eventually received over \$10 million in funding from a “High Priority Project Allocation” as well as an award from the “Pennsylvania Transportation Enhancements Advisory Committee” (GAP History-L, 2023). The GAP currently has forty-nine donors, including various counties, foundations, and corporations, and the Commonwealth of Pennsylvania. As of 2021, the rail-trail’s primary concern was maintenance, and specifically, aging infrastructure (GAP-E, 2021). The GAP Trail Conservancy’s Economic Impact report (2021) called for “[s]tronger coordination through local municipalities and organizations” and “a shared, sustainable funding source” (p. 69) to combat this problem. Otherwise, the organization has not shared publicly its financial status.

Economic successes and challenges

Externally, the GAP has altered many of its communities over the years, as these communities have made economic decisions based upon what the rail-trail can offer them (GAP-E, 2021). A 2009 Campos Inc. report indicated the economic impact of the rail-trail on the small cities along the GAP:

On average, business owners indicated that one-quarter of their gross revenue was directly attributed to trail users and two-thirds reported that they experienced at least some increase in gross revenue because of their proximity to the trail (Campos Inc., 2009, p. 7).

2019 figures indicate that the GAP has had “over \$121 million in economic impact” (GAP-R, 2023), earned through direct “[s]pending by GAP tourists at businesses in the Trail Impact Zone”, indirect “[s]econdary purchases by businesses in the GAP region”, and induced “[h]ousehold spending from income generated by direct and indirect impacts” (GAP-E, 2021, p. 29). Most of these earnings are visible in “accommodation and food services” (p. 31), impacting real estate, transportation and warehousing, and the arts sector, as well.

The GAP Economic Impact report (2021) indicates that there may be some correlation between property values in the area and the rail-trail, but that it is not possible at this time to attribute increased property value to the GAP (p. 62). Nevertheless, the GAP did generate \$19 million in taxes in the area (p. 65) and bring “great health benefits” (p. 66). As it is situated in an area in which “one in five residents living near the GAP are [non-white and/or non-Hispanic]” (GAP-E, p. 58), and most users of the rail-trail are “particularly high earners” (p. 59), the impacts of the rail-trail on lower income earners and more racially diverse populations warrant further exploration.

Summary

The GAP Trail Conservancy claims its “linchpin” is a woman named Linda McKenna Box, whose “passion”, “patience” and strong connections to “philanthropic and environmental leaders” saw the rail-trail to success (GAP History-L, 2023). She believed in “pulling trail

stakeholders together” (GAP History-L, 2023), and finding resourceful ways around any issue blocking the rail-trail’s development, no matter how challenging it was:

Many people use the word “visionary” when describing my role; that is not correct. The “vision” for a trail connecting Pittsburgh to D.C. likely started with the Western Maryland Railway executives during abandonment. “Vision” was carried forward by Josh Whetzel and the Western PA Conservancy; actualized by the crafty work of Ohio pyle superintendent Larry Adams. My role, my self-mandate, was to finish the trail. I developed a procedural vision, how to gather up the separate trail-building efforts and hauled them over the finish line. (Linda Boxx, November 2020, in GAP History-L, 2023)

Underpinning the GAP trail, then, is the idea of internal connection and connection through perseverance, as well as the value of having a leader with the capacity to see a project through from vision to completion. This is an example of “ecocultural edgework” (Lockyer and Veteto, 2013, p. 3) and liberated strategic planning: *‘I am as I do.’* The GAP’s economic success is inextricably linked to this values-based “enmeshment” (Borrows, 2019).

5.5 Alberta’s Iron Horse Trail

Overview

At 278 kilometers, Alberta’s Iron Horse Trail (“IHT”) is situated on Canadian National Railway’s line, itself operational from 1927 to 2000, stretching across three distinct biomes. The path has been used for centuries by the First Nations and Métis of the area, as well (Ironhorse Trail, 2023). In fact, “[a]bout 70% of Canada’s Indigenous communities are located in this area” (Ironhorse Trail, 2018). This includes around “600 Indigenous communities” in the boreal forest surrounding the trail (Ironhorse Trail, 2018).

Strategic plan publicly (and easily) accessible: Yes.

Stake/rightsholder engagement & strategic planning

The IHT is part of the Trans Canada Trail and is owned by North East Muni-Corr, a nonprofit company, which “owns the abandoned CN rail corridor” that makes up the rail-trail (County of St. Paul, n.d., p.6). It leased the land to Riverland Recreational Trail Society (“RRTS”), a nonprofit organization (ITA, 2023). The Riverland Recreational Trail Society guides the rail-trail’s strategic development, prioritizing the values of four distinct stake/rightsholder groups: Indigenous communities, host communities, the tourism industry, and themselves and Muni-Corr (Ironhorse Trail, 2021, p. 16). The RRTS’s vision for the rail-trail emphasizes connectivity to experience, nature, Indigenous Peoples, and modern living, as well as benefits for businesses in the area.

In the development of its strategic plan, the RRTS claims to have fostered significant stakeholder engagement, with “[h]undreds of residents, trail visitors, elected officials, tourism industry operators, directors from the Riverland Recreational Trail Society and many other stakeholders” (Ironhorse Trail, 2021, p. viii). Among these stakeholders, there are no Indigenous Peoples mentioned. Nevertheless, one of the objectives of the trail is to “elevate the other experiences on the trail (e.g., cultural, Indigenous) to create a greater market appeal” (p. 73). One of the IHT’s potential self-guided interpretive itineraries is focused on the fur trade in the area and the impact and experience(s) of the Métis.

The RRTS has expressed interest in engaging “professional recreation and tourism planners, designers and qualified professionals (e.g., biologists, archaeologists, engineers) to undertake feasibility studies and master plans for the development of” (Ironhorse, 2021, p. 111) a trestle, play parks, and a rest area. Additionally, the RRTS “will work with municipalities along the trail to prepare a trail-side vegetation management plan” (p. 131). This focus on sustainable resourcing signifies a commitment to environmental and economic development.

Economic successes and challenges

The Ironhorse Trail focuses primarily on attracting trail users from “Edmonton, central and northern Alberta” as well as smaller numbers from Saskatchewan (Ironhorse Trail, 2021, p. 69).

As of 2021, the rail-trail’s priorities centered on infrastructure and management, including improving “trail tread [and] maintenance”, “[developing] new [and] [enhancing] existing visitor attractions”, and “[improving] signage”, among others (Ironhorse Trail, 2021, p. x). Additional issues noted by the RRTS include “variable levels of service, design and maintenance creating inconsistent experience”, “maintenance challenges” because of “use of the trail as a utility corridor”, and vandalism (p. 90). Maintaining strong media strategies, keeping up to date with tech, and stirring support from local business are also notable challenges. Finally, seeking funding and resources is necessary to addressing these challenges, and the present economic climate may result in fewer funds.

Summary

The Trail has become a model of cooperation and sustainable trail management in Canada, is well resourced and municipalities and landowners along the trail continue to coordinate and collaborate to bring our vision for the trail to life. (p. x)

In addition to the economic benefits the rail-trail seeks to generate, the IHT connects the campgrounds at Whitney Provincial Park, to the pumpkin fair and CN museum at Smoky Lake, to the mushroom statues at Vilna (Seto, 2021). Its ten-year strategic plan sees it investing in the connections between these communities across various policy areas. Like other rail-trails, its predominant public-facing focus is on the health and learning benefits of the rail-trail for users, with “adventure” (p. 45) and “legacy” (Ironhorse Trail, 2023) words commonly used to describe an experience on the IHT.

Indeed, the IHT places users of the rail-trail face to face with Canada’s “settler history”, and has invested in experiential learning along the trail, including “costumed interpreters, guided tours” and the ability to “step back in time” at “Métis crossing” (Ironhorse Trail, 2023). This has created a space for conversations around Truth and Reconciliation among those who visit the trail irregularly or who frequent it for camping.

5.6 Main Themes in Comparative Analysis Research

Rail-trails are networks within networks. Smaller rail-trails are connected to parent rail-trails which span greater distances, often across territorial bounds. They are often pioneered and managed at the local level by a dedicated group of environmentally and economically inclined citizens, who, with the help of governmental and private funding, can create new rail-trail and expand upon existing rail-trail. Each of these rail-trail initiatives present similarities and differences in their processes, strategic plans, and choices, that can provide useful information for the development of FORT-VI’s strategic framework.

The actors involved in the ownership and maintenance of one section of a rail-trail is, at least, a staff, board of directors, and volunteers. Projects beyond this clearly include multiples of this, as well as patrols or some other form of security for each linear park. Every rail-trail relies heavily on volunteered time to ensure the rail-trail remains safe and clean for users. Relatedly, the primary concern for rail-trail organizations is an economic one. Selling the idea of the rail-trail as one that is beneficial to the local economy through tourist dollars is what drives these organizations and secures them provincial, state, or national funding.

There is nevertheless an undercurrent of something far more fundamental in the experience of each rail-trail: namely, the necessity of human connection. Given the local foundations of each rail-trail, passion for the rail-trail lies at the heart of its success. This is true whether it is in the name of heritage, reconciliation, or security. The idea that there is an intrinsic value to rail-trails beyond the economic finds itself in monuments left erect along the path, ceremonies honouring the Mi'kmaw and the Métis in the face of Canada's past, the celebration of snow sports in a beloved space, and attentiveness to the quality of life of locals after the tourists have left.

While the benefits captured here seem to reflect what is addressed in the literature review, the idealistic notion of the rail-trail is plagued by one major issue: financial feasibility. To stay economically viable, rail-trails must maintain connections with governmental and private funders, and even this does not guarantee they will earn more than they lose annually. Maintenance of rail-trails is, as the word suggests, a continuous process, and updating one's approach to infrastructure might mean investing in new tech to improve counters along the path. Additionally, where an ecotouristic attraction relies on tourist dollars, the need to maintain an adequate media strategy is pressing, particularly for lengthier tracks.

Finally, the value of a rail-trail to rural communities regardless of region is both economic and cultural. Like the railway before it, rail-trails bring healthy users to small towns they would not normally visit, boosting local economies, and adding an experiential benefit to the residents. Rail-trail organizations maintain a degree of closeness with their local communities given the makeup of their staff, boards, and volunteers, and their community members have fond or memorable experiences on their rail-trail. Indeed, for many of these rail-trails, usage improved during the global pandemic.

5.7 Multi-Parameter Comparison of Each Rail-Trail

Table 3 below shows the multi-parameter comparison of each rail-trail initiative discussed here, highlighting key concepts that, placed in conversation with one another, may serve FORT-VI.

Table 3: multi-parameter comparison of each rail-trail initiative

		Rail-Trail Initiative				
		OCRT	BLT	Le P'tit Train du Nord	GAP	IHT
Parameter	<i>Addresses Health, Recreation and Ecological Economics</i> 1 (lowest) – 5 (highest)	4	3	5	5	3

	<i>Addresses Land Use, Reconciliation and Governance</i> 1 (lowest) – 5 (highest)	3	4	3	3.5	4.5
	<i>Financial Feasibility</i> (high/medium/low)	medium	medium-high	high	high	medium
	<i>Stake/Rightsholder Engagement & Strategic Planning</i>	5	4	4	4	5

Ratings, Explained

Grounded in the ideas covered in the literature review, this table addresses health, recreation and ecological economics and addresses land use, reconciliation and governance both use a rating system of 1 (lowest) to 5 (highest), with 1 indicating that the rail-trail’s organization, whether in its strategic plan or related public-facing material, does not address the policy areas in question, 3 indicating that it somewhat does, and 5 indicating that it does in a very effective way.

The next criterion, financial feasibility, is related to economic successes and challenges, and uses a high/medium/low ranking system, with low indicating that that rail-trail is unlikely to survive, medium indicating that it brings some financial successes and some challenges, and high indicating it brings more benefits than drawbacks.

The final criterion is directly related to stake/rightsholder engagement and strategic planning. A 5 means high and successful engagement with stake/rightsholders, with successful implementation of their plan or framework equating to success of the rail-trail as defined by the other three factors. A 1 means low engagement with stake/rightsholders and unsuccessful planning, and a 3 means some engagement and somewhat successful planning.

The OCRT: The OCRT is rated at 4 for addresses health, recreation and ecological economics and a 3 for addresses land use, reconciliation and governance because, while it has focused a significant part of its strategy on tourism, recreation and health, it lacks in land use, engagement with Indigenous Peoples, and environmental interests. Its financial feasibility is rated as medium because while the project is from some perspectives successful, it has also been deemed unsustainable. Stake/rightsholder engagement & strategic planning receives a 5 as its adapted approach to governance saved the OCRT and saw it through to success, at least for a time.

The BLT: The BLT receives a rating of 3 for somewhat addressing health, recreation and ecological economics, due to its overall strategy for all these being subject to the Trans Canada Trail. For land use, reconciliation and governance, the BLT receives a 4 for its ongoing and intentional engagement with the Mi’kmaw. Its financial feasibility is rated medium-high for being relatively stable as part of the Trans Canada Trail but losing money regardless.

Stake/rightsholder engagement & strategic planning receives a 4 for its extensive engagement with communities and organizations on multiple levels and partially public-facing strategic plan.

Le P'tit Train du Nord: Le P'tit Train du Nord is rated at 5 for addressing health, recreation and ecological economics extensively in its strategic plan, and having a strong vision across multiple policy areas in this regard. It receives a lower rating for land use, reconciliation and governance for, while it has generally strong policies, it does not pay attention, at least publicly, to the use of Indigenous land—aside from the efforts made by the Trans Canada Trail. Its financial feasibility is ranked high for being a stable part of the Trans Canada Trail.

Stake/rightsholder engagement & strategic planning receives a 4 for its extensive engagement with communities and organizations on multiple levels and partially public-facing strategic plan.

The GAP: The GAP receives a rating of 5 for addresses health, recreation and ecological economics because of its active focus upon health benefits and community connection. For addressing land use, reconciliation and governance, the GAP receives a 3.5 due to the strong leadership of its visionary in combination with ongoing consultation. It does, however, lack engagement with Indigenous Peoples. Finally, the GAP's financial feasibility is rated as high because of its significant funding and extensive number of donors. Stake/rightsholder engagement & strategic planning receives a 4 for its extensive engagement with communities and organizations on multiple levels and partially public-facing strategic plan.

The IHT: The IHT receives a 3 for somewhat addressing health, recreation, and ecological economics—mostly in terms of trail maintenance and promises to engage in consultation in these areas in the future. The vision and values of the IHT are intentional in their inclusion of land use and reconciliation and so it is rated at 4.5 for this criterion. The remaining .5 is for the lack of publicly expressed engagement with Indigenous Peoples. Finally, IHT's financial feasibility is ranked medium because of its stakeholder support and relatively small user population. Stake/rightsholder engagement & strategic planning receives a 5 for its extensive engagement with communities and organizations on multiple levels and detailed, public-facing strategic plan.

6.0 Discussion & Analysis

This chapter presents a discussion and analysis of the comparative analysis chapter, answers the research questions, speaks to new themes and ideas, and summarizes the conceptual framework of the thesis.

6.1 Answering the Research Question

As found in the research, rail-trails are community builders, but oftentimes unsustainable ones, and without a narrative grounded in cohesive relationships with all involved in the rail-trail's development, they will falter. Even still, for the experiential value they bring to their communities, these initiatives are worth pursuing. A 'Good Roads 2.0' evolution in ecological economic frameworks require equal amounts of perseverance and maintenance to see it to reality.

What lessons can be learned from other rail-trail initiatives to help FORT-VI move forward in its goals?

Close inspection of those lessons learned in the literature review, as well as review of the themes present in the five rail-trail initiatives discussed in the previous chapter, elucidate the various paths forward FORT-VI might take in addressing its current situation. To understand in more concrete terms what lessons might be learned from the comparative analysis, the information presented there and in Table 3 can be explored in greater detail through inductive narrative analysis.

Health, recreation and ecological economics

As ecological economics (with special emphasis on the economics aspect) is generally the primary focus of rail-trail initiatives, this parameter was the easiest for those organizations with a strategic plan or related literature to address. Le P'tit Train du Nord, the GAP, and the OCRT rated the highest here, having performed or promised to perform further study on the health, recreational, and environmental impacts of their rail-trails. This intersection of policy areas clearly correlates with the financial feasibility of a rail-trail more strongly than land use, reconciliation and governance does for the initiatives in question.

Human/animal/environmental health

- Human and environmental health were prioritized, with human health often taking precedence, whilst animal health was largely ignored by all rail-trail organizations studied here. Per Moore and Graefe (1994)'s notes on place dependence, "how far the trail is from [users'] home" (p. 17) is a factor, especially with the IHT and the GAP. Increased accessibility over time may therefore improve access to the IRC, regardless of distance. Additionally, the importance a person ascribes to their use of the IRC rail-trail may increase or decrease the longer it exists (Moore & Graefe, 1994). Uncovering ways for the rail-trail to stay relevant may thus be necessary, or perhaps the development of the rail-trail will solidify it within the fabric of the Vancouver Island community.
- Placing Price and Reed (2014) and Chatfield et al. (2014) in conversation with each other infers that FORT-VI's strategic framework should be informed both by who *can* use the trail, who *will* use it, and who *cannot* but could, eventually. They suggest groups the initiative might target, including those with low education, those who are interested in the aesthetic of the trail (Bowring, 2020), and current trail users. While animal health was not

mentioned in the comparative analysis, it may be useful to consider the wildlife population on Vancouver Island in any rail-trail planning, during and after the process of converting existing rail lines into trails.

- Perhaps the most telling point on environmental health is the OCRT's purported inability to be sustainable regardless of the efforts of the Department of Conservation. Wherever environmental health is prioritized, so too is economics, and so the balance between supporting the ecosystem and the financial feasibility of the rail-trail remains its most challenging. A regular examination of conservation efforts along the IRC rail-trail may benefit an emergent strategic framework for FORT-VI, to determine areas for improvement or change. The health of adjacent vegetation may be worth further scrutiny, as well (Muellerova, 2011). The rail-trail itself might offer the opportunity to approach restoration and conservation in a way that marries Vancouver Island's historical baseline with its present environmental condition.

Rural and remote areas

- One of the primary benefits for most of these rail-trails was the economic diversification that occurred because of them. This strength might be levered to FORT-VI's benefit as well, particularly regarding improving the economies of First Nations along the IRC. Questions FORT-VI could ask include: How might ecotourism on Vancouver Island be shaped by FORT-VI's rail-trail (González et al., 2021)? In what ways can tourist dollars be levered to support rural and remote communities connected to the rail-trail? Do all rural and remote communities connected to the rail-trail wish to see ongoing tourism, seasonal tourism, or no tourism? These questions demand also further stake/rightsholder engagement as FORT-VI's strategic framework emerges.
- To avoid the IRC "[lacking] clear identity" (González et al., 2021, p. 220), both the purpose of the rail-trail, and the representation and place of rural and remote areas along the IRC, must be made clear. From the outset, and as the plan emerges, establishing rural and remote communities connected to the trail as equally important will further the cohesive vision of FORT-VI's strategic framework (and any related strategic plan).

Property values

- The strategic plans and related documentation around rail-trails explored here have very little to say about property values. In taking this factor into account, it will obviously be worthwhile to consider that the land around the IRC is Indigenous. A thorough knowledge of the communities impacted by the rail-trail is essential to the successful implementation of any strategy on FORT-VI's part, which implies the need for ongoing stake/rightsholder engagement.
- Another factor highlights the need for ongoing stake/rightsholder engagement: i.e., while the implications of *Brandt Revocable Trust v. United States* (Cook, 2014) are bound solely to the United States, they do bring up the critical point that there are generally many users of the land that a rail-trail organization—in this paper's case, FORT-VI—wishes to develop upon.

Ecological economics

- To avoid ecotourism being more profitable than environmentally friendly, whilst remaining profitable, a strategic framework that champions the IRC rail-trail as an

ecotourist destination should take care how it wields the concepts of conservation and tourism. Questions to ask include: To what extent should FORT-VI be upfront about tourist dollars earned through the IRC, and how seriously does the FORT-VI board, for instance, take conservation efforts along the IRC? In what ways might the IRC be a medium of responsible tourism? Should it be? Will its role change with time? Any question regarding ecotourism might be impacted, as well, by the changing environmental and political conditions in (and out) of the region, and so, post-COVID, a strategic framework might include contingencies for just this.

- Nonprofits like FORT-VI may further their initiatives by examining other ecotourist movements such as whale watching and marine tourism or Indigenous tourism. Future researchers might benefit from conducting a comparative cost-benefit analysis of these initiatives. Another worthwhile area to study would be the intersection of multiple ecotourist initiatives in British Columbia (i.e., how might marine tourism impact the usage of the IRC rail-trail?).

Land Use, Reconciliation and Governance

Land use in this comparative analysis centers on rail-trails as members of the Trans Canada Trail, or else rail-trails that are publicly owned and/or privately funded that retain strong relationships with the communities upon whose land they are situated. The BLT's relationship with the Mi'kmaw is a prime example here.

Organizations that did not directly address reconciliation were nevertheless financially feasible and otherwise successful. That said, in conversation with the information presented in the literature review, the IRC's situation as a BC-based rail-trail is different. British Columbia's politics are deeply connected to this resource-rich land, where there are many vying interests, particularly because of Indigenous-Settler relations along its coasts. The narrative under examination here extends beyond the development of a rail-trail and the sense of community that might establish, to the development of the communities already in existence. Ultimately, FORT-VI's rail-trail initiative is once again indicative of a wicked problem that exists within the fabric of the land it is bound to (Earle & Leyva-de la Hiz, 2021).

As such, lessons learned from each of these rail-trails are revealed in how movement toward reconciliation is augmented by rail-trail development. This is notable in Alberta's IHT as well as Nova Scotia's BLT, both of which go to great lengths to highlight the Indigenous cultures of the land upon which their rail-trail exists and/or to engage with those communities.

Among the rail-trails examined in the comparative analysis, this attentiveness to connection through land use, reconciliation and governance finds echoes in the discipline of strategic planning itself. Creating space around questions of governance may mean addressing these policy areas within FORT-VI's strategic framework. Asking "*Why do we exist? What do we want to be? What do we care about?*" (FNFMB, 2019, p. 28) in the context of reconciliation and strategic planning both can support developing policies and internal governance structures.

Strategic Planning

Much like the Island Rail Corridor, the discipline of strategic planning is transforming—to represent a more integrated world. Built upon a foundation of top-down, managerial approaches to change, a new "emergent" (Bryson, 2018) means of strategy has arisen. This strategic planning is "liberated" (L. Cote, personal communication, 2022), involving actors at every level

of the organization, and upholding the essential voices of stake/rightsholders in their diverse capacities. In the case of FORT-VI, with initiatives spanning across multiple territories, upholding these voices is critical to the success of their initiatives, and to maintaining integrity with the values underlying their cause.

While FORT-VI adapts its own strategic framework (and related plan), with or without commitment to further rightsholder or external stakeholder engagement, any strategy FORT-VI takes would benefit, in structure and content, from an emergent approach. The reason for this, and for keeping the associated actors in mind, is that it grounds FORT-VI in the idea of connection, which is inherent to the initiative the organization is pursuing (as it is inherent to the plans of the BLT, the IHT, and the other rail-trails in 5.0). This approach can be further defined as follows:

- Strategic planning as an adaptable and creative discipline, characterized by “‘out-of-the-box’ thinking” (Poister, 2010, p. 248), which empowers further strategic thinking and management.
 - Recognition of the “interconnectedness” or “involved” nature of the world in which the organization operates creates the opportunity for ongoing dialogue and deliberation. Strategic planning can: “facilitate communication, participation, and judgment; accommodate divergent interests and values, foster wise decision making informed by reasonable analysis; promote successful implementation and accountability; and enhance ongoing learning” (Bryson, 2018, p. 35).
- Strategic planning as a mechanism to add “public value” (Poister, 2010, p. 253) and “respond to the challenges the world presents” (Bryson, 2018, p. 32).
 - Considering “where [they] want to be” (Bryson, 2018, p. 36) together, allows communities the chance to collaborate and make decisions together.
- Strategic planning as a discipline that provides a framework for “coexistence”, dedicated to co-production, partnership, and “creating space” (Bouvier and Walker, 2018).
 - Strategic planning gives associated actors the opportunity to recognize “the importance, and the difficulty, of developing consensus around the values on which planning is predicated” (Poister, 2010, p. 246), and on the values inherent to the plan itself.

This connection-driven triptych lens allows the planner or policymaker to answer the question “What do we want to be?” (FNFMB, 2019, p. 28) with the statement *‘I am as I do.’* This means that the dynamic and emergent nature of FORT-VI’s strategic framework and associated planning is reflective of the aspects of that same framework and planning, e.g., in vision, mission, values, or mandate. It is created to echo the nature of the work it will do.

Put another way, the Island Rail Corridor is not yet feasible in part because the ICF requires greater focus across multiple policy areas. Without this focus, FORT-VI lacks a strategic framework to manage the IRC. Whether this arises from financial feasibility or historical weight or another issue, the issue at hand is this: to develop a rail-trail successfully, using “a set of strategies that will effectively link the organization (or community) to its environment and create significant and enduring public value” (Bryson, 2018, p. 216), FORT-VI requires a greater understanding of the strategic success and failures of other rail-trail organizations.

Stake/rightsholder engagement. Rail-trails promote the experiential value of their rail-trail to the community, whether this is historic value or value through connection with local

communities. Given the frequency with which it is mentioned, and the number of volunteers that give their time to maintaining rail-trails, this experiential value cannot be understated. While it might not have the same economic value as tourist dollars or tax revenue brought in by rail-trail users, the experience, or the story, is nonetheless the core reason why rail-trails find success.

Any strategic framework developed for a rail-trail hinges upon the success of this narrative. This experience of a rail-trail is one that involves all stake/rightsholders, including, importantly, its users. The experience of the rail-trail is that of a space between, a place of connection, and it is what builds relationships between all involved.

Eco-development. Policies surrounding eco-development environ health benefits through tourism. As for the larger conversation around Good Roads 2.0, these rail-trails are significant in their legacy of preserving local communities re: heritage and economic benefits. The more prominent focus of these new eco-pathways is not so much sustainability, for as the OCRT points out, rail-trails are not necessarily sustainable, but that they return users who are isolated in other ways (e.g., rural and remote communities) to a more connected way of being. Incorporating vulnerability and resilience (Karyono et al., 2017, p. 42) also shows us that FORT-VI's strategic framework should make space for adaptable policy over time.

Financial Feasibility

Le P'tit Train du Nord and the GAP rail-trail initiatives provide FORT-VI with the two primary examples of financially feasible projects, and each of these projects has its own kind of funding source. One is successful as a part of the Trans Canada Trail, and the other received significant government and private funding. Thus, financial feasibility is achievable in multiple ways. The degree of financial feasibility may be dependent upon the rail-trail organization's leadership.

The success of these rail-trails varies, but all rely on a significant marketing strategy, focused upon environmental, health, and historic benefits. Rail-trails with greater funding clearly benefit from more effective strategic frameworks, and vice versa. In Canada, these rail-trails either have the benefit of seeing funding from the Trans Canada Trail, and/or operate individually with the benefit of their nonprofit society and municipal and corporate partners.

Where these initiatives were and remain successful, their strategies depend(ed) upon extensive engagement in developing strategic plans and plans for further engagement regarding various aspects of their rail-trail, such as trail maintenance and the creation of trestles. Leadership, and especially, perseverance, in some rail-trail organizations contributed to the success of this engagement. On more than one occasion, a single visionary convinced others to believe in the success of the idea.

Rail-trails have some longevity where economic success is concerned but are generally unsustainable without proper funding. For instance, generally, while the usage of rail-trails like the BLT increased during the pandemic, establishing a sense of community in a time of isolation, their economic gains were fewer. In cases where money was lost, the effect seems to be that after years of successful campaigning and higher usage, local and other interest for using the rail-trail plateaus. This translates into an initiative that is largely focused upon maintenance: of garnering interest in the rail-trail, and in the rail-trail itself.

Every rail-trail's primary economic concern is rail-trail maintenance, and since all rail-trails are supported by a significant number of volunteers, a slight economic loss each year suggests that

without the proper infrastructure the rail-trail might not be a worthwhile investment to stake/rightsholders.

Whether pursuing the construction of a rail-trail is worth it, given the economic drawbacks, seems to be highly dependent upon an organization's relationships with stake/rightsholders. Rail-trails become financially seductive to stake/rightsholders when there is strong coordination between all involved, a fitting target population, and a sustainable funding source and revenue from companies that sell to trail users.

6.2 Unexpected Findings

The benefits of rail-trails are far-reaching, but despite this, they are not as successful as they could be. The predominant reason for this is financial—they do not receive the funding they need to, to gain rather than lose—which seems to indicate that they have not yet been recognized as feasible initiatives. This could, in turn, signify that, for rail-trails to gain more value in primarily capitalistic economies, those who support them should also support ecological economics and related conservation movements. FORT-VI's success might depend upon how the organization writes itself into the larger narrative fabric of ecological economics in Canada.

These findings also provide researchers with a new lens through which to observe, build, and augment existing ecological economic frameworks. The sustainability-driven movement toward rail-trail development may indeed be Good Roads 2.0.

6.3 Further Research

The multivarious data on rail-trails demonstrates the need for a deeper content analysis and further situation analyses on existing rail-trail initiatives. Exploring the areas of interest—e.g., tourism, sustainability, and recreation—touched upon by much of the literature, in addition to related areas, can support approaches to stake/rightsholder engagement. Understanding how stake/rightsholders are currently engaged by FORT-VI, and how they have been engaged by other rail-trail organizations, can illuminate useful approaches to developing a strategic framework.

Though five additional methods of research were not used in this paper, they were planned. Note that the majority of these were developed with the understanding that this thesis was to accompany the development of a strategic plan for FORT-VI. That goal eventually transformed into supporting FORT-VI in the development of its strategic framework, though aspects of strategic planning (e.g., approaches to strategic planning) appear throughout this paper.

See below:

Method #2: focus group(s)

One to three (1-3) FORT-VI focus group(s) might consist of up to eleven individuals on the Friends of Rails to Trails Vancouver Island board. The idea is to gather all existing board members virtually, to have a one-to-three-hour discussion about what they would like to see for their organization moving forward, and for the IRC rail-trail initiative specifically.

The first, and potentially only, one of these focus groups would ideally take place in [month], prior to the submission of the draft thesis in [month]. Members of the board could be contacted individually prior to this engagement through Dr. Kimberly Speers, to arrange a suitable date. A consent form (Appendix A) would be included in the initial email to board members (Appendix

B). This might not be the last focus group used in the development of this strategic plan after its author leaves. Any strategic framework developed by FORT-VI is an emergent one, and therefore subject to constant development.

The focus group session(s) should follow a curated format informed by the University of Victoria's online thesis preparation course. Results from the focus group(s) will be placed into conversation with results from the document review and survey to arrive at the final product.

See appendices for relevant documentation, especially Appendix A, Appendix B, Appendix C, and Appendix E.

Method #3: sharing circle

A Sharing Circle may be useful for the IRC rail-trail strategic framework, as for the project to carry on a legacy of reconciliation, and to therefore bear a deeper degree of legitimacy in a world governed by the United Nations Declaration of the Rights of Indigenous Peoples, it needs to take into account the voices of the Indigenous communities it affects, as it purports to.

This Sharing Circle can involve leading members of all impacted Indigenous communities, including the fourteen First Nations within the IRC rail-trail development area (see Appendix F), who agree to join FORT-VI and the researcher in pursuing options. An effort might be made to contact these individuals for a gathering in-person or virtually sometime in [month], after the focus group meets. During the Sharing Circle, the basic outline of a strategic framework or plan, as developed with input from FORT-VI's board and relevant persons, can be shared with those present. These individuals can then comment on the project and their wishes for it and opinions of it.

Should this Sharing Circle prove too complicated to organize prior to [month, year], then it should be written into FORT-VI's strategic plan that such an activity need take place as part of the plan's emergent nature. Reconciliation is at the heart of the community-building inherent to the IRC project, and so this method is necessary to its success.

Method #4: survey

In addition to sources garnered from libraries, the board could receive a survey conducted through SurveyMonkey. To compliment the composition of the literature review, the data might be coded using the same concepts outlined in 2.0. SurveyMonkey software can be used for the survey analysis.

See appendices for relevant documentation, especially Appendix D.

Method #5: key informant interviews (A)

Interviews conducted with up to twenty (20) stakeholders/rightsholders might occur over the course of six-seven months from the date the ethics review is accepted to the defense of the thesis. Interviewees might include five stakeholders from local nonprofits or corporations (e.g. Nicole Vaugeois, Leanna Warman), five from local or Indigenous governments (e.g. Joni Olsen, Sarah Potts), and ten from or related to rails-trails organizations within our outside of Canada (e.g. Dr. Achim Bartoschek, Rose M.Z. Gowen, M.D.). Please note that the examples given here are just that: as the interview document develops, and the ethics review is processed, the list of interviewees can be finalized in conversation with supervisor Dr. Kimberly Speers.

In keeping with the democratic approach to emergent planning that is, by now, a recurring theme throughout this thesis, the interview process should follow the qualitative design: the author should ask different, specialized questions to each interviewee, and will as such use a semi-structured questionnaire (to be developed and incorporated into the thesis). The author can pay special attention to relevant experience, needs, and desires, rather than accuracy, as it were. For example, of members of rails-trails organizations outside of Canada, the author might ask what has and has not worked in their planning processes, with the aim of receiving specific and non-standardized feedback. For those working for local governments, the focus might be on what benefits and drawbacks they see offered by the IRC rail-trail, among other things.

Method #6: key informant interviews (B)

An alternate form of the key informant interviews method was developed toward the end of the thesis's development, and this was to interview representatives from the Otago Central Rail Trail in New Zealand, the B.L.T. Rails to Trails Community Trail in Nova Scotia, Le P'tit Train du Nord in Quebec, the Great Allegheny Passage in America, and Alberta's Iron Horse Trail, and ask the following:

1. (Do you have a strategic plan?) How was it developed? Who was involved in developing the plan?
2. How effective has your plan been in each stage of development for your rail-trail initiative? What did you choose not to include in your plan?
3. How does your organization consider: a) Mobility, Planning and Design; b) Health, Recreation and Ecological Economics; and c) Land Use, Reconciliation and Governance, and how, if at all, does your strategic plan engage with these ideas?
4. In what ways is your organization focused on reconciliation with Indigenous communities in the region?
5. Do you feel your strategic plan has been fully implemented, and would you say your rail-trail is successful?

Given more time, this method might have been the most useful in determining more information pertinent to FORT-VI's initiative and similar projects in Canada and beyond.

6.4 Further Strengths and Limitations

This thesis has contributed to an ongoing conversation about rail-trails in Canada and globally that is just beginning. It is an accoutrement, so to speak, to the work of Scherrer et al. (2021) and augments the studies of rail-trails and their significance highlighted in the literature review. Further studies comparing rail-trails across Canada and internationally, are recommended. These can supply greater expertise to the conversation on the evolving place of rail-trails in local, national, and international communities. Relatedly, as alluded to in 3.6, there are a variety of ways to improve upon the information conveyed here, and all of them involve speaking with various stake/rightsholders.

This thesis acts to unify information about rail-trails for the purpose of supporting FORT-VI in establishing a strategic framework, but there remain some knowledge gaps around how the rail-trail initiatives discussed in 5.0 were managed and how FORT-VI might manage its initiative, stemming primarily from a) the lack of discussion around asset management and b) less discussion than might prove useful on Truth and Reconciliation. Moreover, there is a lack of connection in some places between what is discussed in the literature review and what is

examined in 4.0 and 5.0, simply because that knowledge is not public-facing or has not been explored yet. Other knowledge gaps exist.

For this reason, it is highly recommended that future research on rails-trails initiatives use the information in this thesis, including its consent form and interview questions, as a starting point. The information contained in this thesis is ripe for development, beginning with interviews with each of the rail-trail organizations mentioned in 5.0, or with pursuing the idea of a Sharing Circle with First Nations in the area of the Island Rail Corridor. The variety of studies that could be conducted around ecological economics and related (e.g., ecotourism), Truth and Reconciliation through ecosystem-services, financial feasibility of rail-trails (versus experiential value), is encouraging. The potential of the rail-trail as a metaphor for *the space between* lends itself well to similar initiatives, as well, in spheres like landscape architecture and rural development.

Lastly, in the interest of emergent planning, this thesis should be pulled apart, dissected, and argued about extensively. It can only prove more trustworthy if more voices become involved in the creation of FORT-VI's strategic framework and continue discussion around the themes and research questions presented here. Indeed, without further collaboration, the thesis might not service Friends of Rails to Trails Vancouver Island in the manner it needs to, lacking some degree of reliability and validity. More engagement is always suggested, with internal and external stake/rightsholders, with the ideas presented in this thesis, and particularly with ideas that planners disagree with.

7.0 Options and Recommendations

Initiatives like the Island Rail Corridor are the confluence of vision, mission, mandate, and values, with planned maintenance and management, community values, and aspirations for a greener world. The choices made by the organizations governing the development of the IRC, the OCRT, the BLT, the GAP, Le P'tit Train du Nord, and the IHT, are reflective of their part in establishing an ecosystem-service (van Riper et al., 2017) that straddles the line between what is financially feasible and what is experientially valuable. In this way, each rail-trail becomes a part of the larger story of Good Roads 2.0.

Based on the findings in this paper, FORT-VI has lessons learned and best practices to refer to as it moves forward in pursuing development of the IRC. These may contribute to the creation of an strategic framework, which can serve to underline all recommendations offered by this thesis. Note that a strategic framework, and any related plan, is not necessary to accomplish the options and recommendations in 7.2, but given the research performed for this paper, it is proven to be highly indicative of the success of an initiative. The options and recommendations in 7.2 were conceived based upon how best they could contribute to FORT-VI's strategic framework—and, by extension, the IRC's success.

7.1 Next Steps for Friends of Rails to Trails Vancouver Island

Compared to the five rail-trails examined in 5.0, FORT-VI has no major corporate partners and does not have funding from the Trans Canada Trail. It also does not yet have a public-facing strategic framework—the basis for this thesis—or strong coordination amidst its partners. It does, however, have the foundation of environmental, health, and economic benefits, a fitting target population, and endorsements from companies that support its vision. With this in mind, it could be useful for FORT-VI to explore either deepening its relationships with current and new external stake/rightsholders, especially the First Nations in the rail-trail's area and seeking alternative modes of funding.

Building the strategic plan

Developing a strategic framework

A strategic framework begins with the development of a governance structure that allows for engagement with internal and external stake/rightsholders in an emergent capacity, with the intent to build ongoing relationships.² It involves the creation of a narrative, or vision, that engages these actors, and it covers many different policy areas through lenses that are important to them. All strategies within it should be informed by the experiential quality of the rail-trail for all its users.

Relatedly, implementation requires more forethought than strategy formulation, because “[t]he way in which strategies are formulated is less important than how good the strategies are and how well they are implemented” (Bryson, 2018, p. 237). In FORT-VI's case, given recent decisions against rail-trail development, strategic formulation might benefit from a “bottom-up” approach (Bryson, 2018, p. 245), involving as many actors as possible. Additionally, information gleaned from those engaged should never be viewed or used in a “purely symbolic” way

² Bryson (2018) notes that “the attention and commitment of key decision makers” (p. 357) is one of a strategic plan's most valuable resources.

(Bryson, p. 274). When stake/rightsholders are engaged meaningfully, as in the case of the OCRT governance group, there can be success, economic and otherwise.

Beyond meaningful stake/rightsholder engagement, a strategic framework is one that focuses upon strategies for rail-trail maintenance, media and marketing especially around health benefits, and upholding the rail-trail's historic value.

Finally, a strategic framework can benefit from a process champion: a person who “believes in the process and [sees] his or her role as promoting effective thinking, acting, and learning on the part of key decision makers” (Bryson, p. 354). This was the case for both the OCRT and the GAP Trail Conservancy. In addition to sponsors who believe in and can support the initiative financially, this person can help shape the narrative with input from stake/rightsholders.

Other points of interest: strategic planning, decision-making, and leadership

In moving toward an effective strategic framework for the IRC, FORT-VI might also consider more granular lessons learned from the other five rail-trails:

- A conspicuous aspect of marketing for all rail-trails is the ability to connect local communities, and so there are two types of trail users that organizations might target: local and foreign. Understanding which audience to target over the other, or to target both equally, is the product of engagement. The number of tourists on Vancouver Island, and the number of residents of a certain age who live there, would both be critical data points in determining the long-term success of the initiative.
- Impact reports on environmental, animal, and human health, property values, and historic significance would all be beneficial in a long-term strategic plan. The categories in 2.0 can help guide the development of this. FORT-VI could especially benefit from reports on: human health benefits, community-building with Indigenous Peoples and Truth and Reconciliation in the area, and conservation.
- Determining the place and value of local communities, Indigenous and non-Indigenous, through engagement, might be useful in determining the narrative of the IRC.
- Given the similar roots of each rail-trail, small and large, there seems to be an opportunity to leverage related experiences to the benefit of all. This is worth further exploration, perhaps starting with a scan of media and/or social media strategies for a group of rail-trail organizations.
- There may be some benefit to exploring the necessity of human connection further as value-added for rail-trails. Rail-trail organizations may be inextricably linked to economic benefit for the sake of survival, yet straying from this narrative may not guarantee metaphorical death. As part of the Good Roads 2.0 movement, rail-trails may be just the place to shift the economic conversation in a rebellious—though not anti-capitalist—capacity.

In addition to these granular points, FORT-VI might consider the following updated vision, mission, values, and mandate statements, based upon conclusions drawn from the literature review and comparative analysis.

Vision: Friends of Rails to Trails Vancouver Island is committed to creating a network of flourishing rail-trails, connecting communities across Vancouver Island for their continued environmental and economic success.

Mission: To enrich sustainable connection, reconciliation, and prosperity across Vancouver Island.

Values: Rail-trails are pathways across time, connecting our past with our present, and its ever-living hope for renewal. Without the tracks, we would not have the foundations of Vancouver Island, nor the deeply rooted connections between each of its communities. In transforming these tracks to trails to be enjoyed by these communities, we reinvent the idea of connection on the Island, and re-establish ourselves as one and many.

The rail-trails are repositories of living history, bridging and sustaining communities environmentally and economically, and bearing the promise of reconciliation. Visitors and residents alike deepen their relationship with this land when they walk these paths. They step into a future built of respect, integrity, and accountability to nature and to each other. These values are at the heart of Friends of Rails to Trails Vancouver Island. Compassion through connection; transformation through preservation.

Mandate: Working in collaboration with Indigenous Peoples, settlers, visitors, and related agencies, Friends of Rails to Trails Vancouver Island is committed to advancing the conversion of rail rights of way for use by walkers, cyclists, and other non-motorised means of transportation.

Finally, based upon the data gathered, three options to move forward are offered to FORT-VI as they continue to pursue development of a strategic framework for the IRC. The first of these is the recommended option, and it is recommended based upon the discussion of how stake/rightsholder relationships are essential to a strategic framework.

Working with(in) the strategic framework

All options and recommendations are made with the caveat that further research is necessary to the success of FORT-VI's initiative and can support an emergent strategic framework.

Underlying each recommendation are four proposed strategic goals for the IRC. These can also be used as guidelines for future rail-trail development initiatives:

1. Provide enhanced social, environmental, and economic experiences for areas impacted by the IRC rail-trail.
2. Address all concerns for landholders in and around areas where the IRC rail-trail will be developed in a reconciliatory manner.
3. "Allay concerns about asset management issues surrounding" (Scherrer et al., 2021, p. 97) the IRC rail-trail.
4. Work in collaboration with "other community groups lobbying for reinstatement of rail services or for alternate uses of [the] disused railway corridor such as nostalgic or tourism-themed rail operations" (Scherrer et al., 2021, p. 97).

Option #1 (recommended): actively pursue further engagement with Indigenous Peoples and expand consultations with external stakeholders

Given the wealth of benefits presented by rail-trail initiatives in Canada and elsewhere, as well as the potential for these benefits to be enjoyed by First Nations on whose land the rail-trail exists, it is worth exploring further engagement with Indigenous Peoples as well as further consultations with external stakeholders. It could be useful to begin by speaking with representatives of all rightsholders individually.

Why is this useful?

The discipline of strategic planning and the literature around rails-trails initiatives, taken together, confirm that one of the great lessons of rail-trail development spurs from connection. To reach a point of connection, however, the story that is created around the development of a strategy relies upon all nuanced aspects of its whole. In other words, there is no denying the benefits of rail-trails, and indeed especially for Vancouver Island, but these benefits mean little if they stand in the way of the reconciliatory work the stake/rightsholders are already engaged in. The authors of any strategic vision for the Island Rail Corridor may therefore reach an effective strategic framework, but this can only be done together with Indigenous authors whose authorial autonomy was robbed of them in the taking of that land.

This paper focused on multiple locations that emphasized Indigenous-Settler relationships. In two rail-trails this was made a prominent aspect of the story of their ecosystem-service. The first of these was the BLT, and its relationship with the Mi'kmaw, and the latter was Alberta's Iron Horse Trail.

The BLT appeared to honour the First Nation in its events and marketing. The health of this relationship was conveyed through the rail-trail organization and not the Mi'kmaw, and without all nuanced aspects of this story, and so there is no tried way to tell if the Nation works harmoniously with the BLT. Further exploration, perhaps through key informant interviews, may help elucidate this. In the interim, strategic planners are left with one potential area of rail-trail development that successfully involves Indigenous authors.

Alberta's Iron Horse Trail honours Métis history and that of myriad First Nations, as well—and this is reflected in its marketing. Placing users in conversation with Canada's "settler history" (Ironhorse Trail, 2023) allows for the opportunity for the Truth in Truth and Reconciliation to be heard.

The public-facing success of these initiatives, in contrast with the yet-to-be-successful IRC, indicates that the political climate in British Columbia is different than everywhere else in Canada. British Columbia, and Vancouver Island especially, being resource-rich and unceded land, the approach FORT-VI will need to take toward development will differ from the experiences of these other rail-trail organizations—but can be influenced by them.

Option #2: seek amalgamation with the Trans Canada Trail

The second option for FORT-VI is to seek amalgamation with the Trans Canada Trail. The BLT, Le P'Tit Train du Nord, and Alberta's IHT all saw increases in funding and/or other forms of planning success after joining the Trans Canada Trail, and there is an opportunity here for FORT-VI's IRC to become the 'end-of-the-line' for the Trans Canada Trail. To reach a point where this can be feasible will require discussion among internal stakeholders in the Island Corridor Foundation, and this option does not preclude engagement with the First Nations on Vancouver Island directly or indirectly impacted by the rail-trail. In fact, engagement would be necessary to the success of this initiative.

Notably, one of the pillars of the Trans Canada Trail is a commitment to Indigenous reconciliation (TCTrail-I, 2023). The Trans Canada Trail "support[s] Indigenous leadership [...] on Trail development projects on traditional territories, "encourage[s] Trail groups to develop partnerships with local Indigenous communities, and to recognize and honour First Nation, Inuit and Métis peoples by acknowledging the traditional territories through which the Trail passes",

and “[has] established an Indigenous Advisory Committee comprised of individuals from Indigenous communities to provide guidance and advice to Trans Canada Trail staff as it relates to Indigenous communities and culture” (TCTrail-I, 2023).

Why is this useful?

This option depends largely upon the governance structure and vision of members of the Island Corridor Foundation and Friends of Rails to Trail Vancouver Island. If it does not align with their vision, then there may be no reason to pursue this at all. Nevertheless, the benefits include a predetermined strategic framework as developed by Trans Canada Trail, funding opportunities even beyond the Trans Canada Trail—like what occurred with the BLT and Coca Cola Canada—and a Truth and Reconciliation-focused ecotourism hub.

Option #3: develop smaller areas of the IRC first

Understanding that land claims will continue to present a challenge for some time, and understanding that continued discussions with Indigenous rightsholders and other stakeholders can benefit rail-trail development, it might be worthwhile to consider developing smaller areas of the IRC, in a similar manner as the BLT Association with its rail-trail, part of the larger Rum Runners Trail.

Why is this useful?

A smaller rail-trail can be developed without as much funding as would be needed for the entirety of the Island Rail Corridor and there is a potential for the land to be negotiated for more easily. Amalgamation with the Trans Canada Trail is still a possibility with this option, and it does not preclude the possibility of expansion either.

This option does not satisfy the desire for compassion through connection and transformation in terms of connecting Indigenous communities throughout Vancouver Island, but it does set the groundwork for the beginnings of this idea. Smaller rail-trails may still service the idea of bringing together rural, isolated communities and honouring historic sites, while providing environmental and health benefits. This option could also benefit the wildlife in the area, as there would be less disruption to their habitat. Note once again that impact on wildlife was not mentioned in any of the rail-trail analyses in 5.0—a piecemeal approach to this initiative might permit the opportunity for the study of rail-trail impacts on wildlife on Vancouver Island.

8.0 Conclusion

As they are a relatively new phenomenon, there is still so much to learn about rail-trails. Certainly, they provide fertile ground for understanding the disciplines of community development and strategic planning, and for exploring the various ways humans relate with one another. FORT-VI sits at an exciting threshold for discovery. Regardless of whether the Island Rail Corridor initiative is successful, which it seems to have the potential to be, the organization's experience will contribute to a larger conversation about the social, political, and economic climate of British Columbia, Canada and beyond.

As the hundredth rail-trail in Canada, the IRC may be a foundational aspect of Good Roads 2.0—i.e., the evolution of sustainability-(or, community-)driven movements—and, either way, has the potential to be a precedent-setting initiative at the intersection of reconciliation and recreation. A strategic framework will encourage strong coordination between all involved stake/rightsholders, pursuit of a sustainable funding source(s), and a potent vision to see the project realized. FORT-VI's place in the ongoing conversation is a dynamic one, and the challenges its members face reflect broader challenges faced by their local, national, and international communities.

A brief final note must be made on the intersection of narrative and experience. The value of a project—of a story, of a life—reveals itself in the experience of it: in its construction (or its strategic planning), in its tending (or emergent changes), and in its continual use. The FORT-VI rail-trail and others like it act as a center for experience, or a space between—between communities, cultures, and times. It is therefore a community itself. Within this community, thoughts may be gathered, memories created, and stories shared.

The Island Rail Corridor offers both the opportunity and knowledge needed to look to the future in celebration of what can be, while appreciating the lessons brought to Vancouver Island by its history. In exploring the value of the FORT-VI rail-trail, readers and rail-trail users alike can ask what it signifies in British Columbia, Canada, and beyond. To understand the value of a rail-trail, and therefore the value of a space between, readers of this thesis might walk a rail-trail, run it, ride it, or simply enjoy it, themselves.

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10.0 Appendices

Appendix A – Participant Consent Form



**University
of Victoria**

Participant Consent Form

Project Title: Friends of Rails to Trails Vancouver Island Strategic Plan (MPA
Masters Thesis)

Funded by: N/A.

Client: Friends of Rails to Trails Vancouver Island; Alastair Craighead (Friends of Rails to Trails Vancouver Island Board of Directors)

Researcher(s): Natasha Mihell, Graduate Student, School of Public Administration, University of Victoria, [phone number], [email]

Supervisor: Dr. Kimberly Speers, School of Public Administration, [phone number], [email]

Co-Supervisor: Dr. Bart Cunningham, School of Public Administration, University of Victoria, [phone number], [email]

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Purpose(s) and Objective(s) of the Research:

- On behalf of [Friends of Rails to Trails Vancouver Island \(“FORT-VI”\)](#), this thesis sets out a five-year strategic plan that will guide FORT-VI as well as relevant stakeholders and rights holders (“associated actors”) through the development of a 224km E&N rail-trail from Victoria, British Columbia to Courtenay, British Columbia.

This Research is Important because:

- Rail-trails initiatives are lenses through which to view the changing faces of “social, environmental, and economic factors” (Scherrer et al., 2021): ecotourism, ecological economics, and community development, among other things. This strategic plan will be useful for current and future FORT-VI projects, but its value extends to other nonprofit organizations interested in establishing similar initiatives. It is a microcosmic effort meant to inspire compassion through connection in BC and around the world.

Participation:

- The participant is a member of the FORT-VI board, and therefore in a position to offer critical insight to the development of their organization's strategic plan.
- Participation in this project is entirely voluntary.
- Whether you choose to participate or not will have no effect on your position [e.g. employment, class standing] or how you will be treated.

Procedures:

- The Researcher will be administering a survey. She will be using the University of Victoria's SurveyMonkey Software, supported by the University of Victoria. See the following link for more information: <https://www.uvic.ca/systems/support/web/surveymonkey/index.php>.
 - Duration: 20 minutes
 - Location: Virtual (SurveyMonkey)
- The Researcher will be conducting one to three Focus Groups. The web-based technology used to conduct each will be Zoom. All other discussions will be held either over Zoom informally, face-to-face, over telephone or email.
 - Duration: 1-3 hours
 - Location: Virtual (Zoom)
- The Focus Group(s) will be recorded using Zoom (audio and video) and notes will be taken by the Researcher on their personal device (e.g. notebook or laptop). Signing this consent form demonstrates that you are comfortable with this.
- Data gathered from the Survey will be anonymous.
- ~~Please be advised that information about you that is gathered for this research study (STATE IF IT INCLUDES IDENTIFIABLE INFORMATION) uses an online program located in the U.S. or a program that can be accessed from the US (FluidSurveys). As such, there is a possibility that information about you may be accessed without your knowledge or consent by the US government in compliance with the US Freedom Act.~~

Benefits:

- BENEFITS TO PARTICIPANTS -- The predominant benefit to participants in the study is the knowledge that they will have contributed to the creation (and potential use) of the rail-trail in question. They may also find their contribution leads to further academic or practical interest in rail-trails, and they can be satisfied that they have supported social, environmental, and economic growth in impacted Vancouver Island communities.
- BENEFITS TO SOCIETY -- The next Canadian rail-trail will bring about a wealth of social, environmental, and economic benefits for Vancouver Island communities, help to further situate Canada as a leader for green movements and reconciliation, and connect British Columbians and Canadians with a broader rail-trails (eco-savvy and health conscious) community.
- BENEFITS TO THE STATE OF KNOWLEDGE -- The literature on rail-trails research in Canada and around the world is lacking. This is relatively unexplored ground, and therefore there is opportunity here to explore the intersection of policy and tourism, among other research areas.

Risks:

- There are no known or anticipated emotional, social, psychological, physical, economic, or other risks to you by participating in this research.
- **Risk(s) will be addressed by:** All participants will be engaging in the study voluntarily and consensually, and will be taking part in a Focus Group and the survey. Both the Focus Group(s) and Survey will be conducted virtually, posing no physical or emotional risks to participants that the author

can control. As such, this study constitutes minimal risk research.

Withdrawal of Participation:

- You may withdraw by sending an email to the Researcher or her Supervisor(s) at any time without explanation or consequence.
- Should you withdraw, your data will continue to be used in the construction of the strategic plan and thesis.

Continued or On-going Consent:

- Data gathered from the Survey and Focus Group(s) will be reviewed in an ongoing capacity for the purposes of creating the FORT-VI strategic plan and defending this thesis. Follow-up (informal) phone calls and emails may occur to continue discussions after the fact. This research will occur until November 2022.
- All data gathered may be used in future research.

Anonymity and Confidentiality:

- It is very unlikely that any information shared during the data gathering stage of this thesis, or any subsequent stage, will be confidential. There is therefore no need to ensure the anonymity of participants or the confidentiality of their data. That said, data gathered from the Survey will be anonymous.
- If, however, there do arise circumstances where information shared is confidential, the author of the thesis will share it using a pseudonym and modified identifying features (e.g. Sam at X rail-trail organization vs. ACTUAL NAME at ACTUAL ORGANIZATION'S TITLE rail-trail organization). The pseudonym and modified identifying features MUST BE AGREED UPON IN WRITTEN FORM by both the author and the person sharing confidential information.
- By signing this form, you are demonstrating that you are aware that your involvement in this thesis, and accompanying strategic plan, will be public knowledge.

Research Results will [may] be Used/Disseminated in the Following Ways:

- Research results will be disseminated as a thesis (and presented to a panel during a defense as such), and potentially, through publication (in an article, chapter, or book). In this way, it may be discoverable on the internet. In addition, once defended, the thesis itself, including the completed strategic plan already shared with the organization in early autumn, will be sent via email to ALL participants in the project, including Focus Group participants and the thesis supervisor. Though there is no plan to do so at the moment, the author is willing to disseminate the results of the research to the FORT-VI board through a presentation, if necessary.

Disposal of Data

- All non-confidential data will be archived indefinitely, given its low-risk nature, in case it should prove useful for further studies. This is necessary only insofar as it may be of interest to future research. The data will contain identifiers given its non-confidential nature. All archived data will be stored in encrypted (password protected) files, on the author's personal laptop AND in a hard drive stored in a secure location.

Questions or Concerns:

- Contact the researcher(s) using the information at the top of page 1;
- Contact the Human Research Ethics Office, University of Victoria, (250) 472-4545 ethics@uvic.ca

Recorded Images/Data:

Participant to provide initials, *only if you consent*:

- Photos may be taken of me for: Analysis_____Dissemination* _____
- Videos may be taken of me for: Analysis_____Dissemination* _____
- Audio may be recorded of me for: Analysis_____Dissemination* _____

***Even if no names are used, you may be recognizable if visual images are shown as part of the results.**

Waiving Confidentiality:

I consent to be identified by name / credited in the results of the study. I consent to have my responses attributed to me by name in the results.

_____ (Participant to provide initials)

Future Use of Data:

(Participant to provide initials)

I consent to the use of my data in future research: _____

I do not consent to the use of my data in future research: _____

I consent to be contacted in the event my data is requested for future research: ___

-----//-----

SURVEY CONSENT: Consent for Participation in the Survey:

By completing and submitting the SurveyMonkey questionnaire, YOUR FREE AND INFORMED CONSENT IS IMPLIED and indicates that you understand the above conditions of participation in this study and that you have had the opportunity to have your questions answered by the researchers, and that you consent to participate in this research project.

FOCUS GROUP(S): Consent for Participation in Focus Group(s):

Your signature below indicates that you understand the above conditions of participation in this study and that you have had the opportunity to have your questions answered by the researchers, and that you consent to participate in this research project.

_____ *Name of Participant*

_____ *Signature*

_____ *Date*

A copy of this consent will be left with you, and a copy will be taken by the researcher.

Appendix B – Email Script Introducing Project and Consent Form

Dear [FIRST NAME] [LAST NAME],

It is a pleasure to meet you virtually through my supervisor, Dr. Kim Speers!

As you are aware, I am currently working on my MPA Master’s Thesis, the intent of which is to work together with members of the FORT-VI Board of Directors and FORT-VI President Alastair Craighead to develop a five-year strategic plan for Friends of Rails to Trails Vancouver Island (“FORT-VI”). This plan will guide FORT-VI as well as relevant stakeholders and rightsholders (“associated actors”) through the development of a 224km E&N rail-trail from Victoria, British Columbia to Courtenay, British Columbia. You can find more, highly detailed information about my thesis and FORT-VI’s strategic plan in my research proposal, attached to this email.

Please also find attached a consent form for you to sign. This consent form is for your participation in a Survey and multiple focus groups between now and [month, year] to develop FORT-VI’s strategic plan. This information, as you can imagine, will be used in both my graduate thesis in the University of Victoria’s Master of Public Administration program, and to create the full-fledged strategic plan that will be presented to your organization in [month].

If you are able, and at your earliest convenience, please confirm you have received this email and return the consent form to me, signed, in an email. If you have questions or concerns regarding the project, please do get in touch. I am eager to hear your needs and to keep an open dialogue throughout this process. It is my intent to serve FORT-VI and its stakeholders to the best of my ability during our partnership.

Thank you! I very much look forward to working with you over the next eight months.

Best,
Natasha Mihell

[email] / [phone number]
MPA Student, University of Victoria

Appendix C – Reminder Email Script

Dear [FIRST NAME] [LAST NAME],

I am reaching out with a friendly reminder that, approximately one week ago, I sent you an email containing information about my Friends of Rails to Trails Vancouver Island (“FORT-VI”) research project. The intent of this project is to work together with FORT-VI President Alastair Craighead and the members of the FORT-VI Board of Directors to develop an effective strategic plan for your organization.

In the email, you will have been able to see my research proposal as it currently stands, as well as a consent form for you to sign. The consent form is for your participation in a Survey and multiple Focus Groups between now and [month, year] to develop FORT-VI’s strategic plan. This information will be used in my graduate thesis in the University of Victoria’s Master of Public Administration program, and to create the full-fledged strategic plan that will be presented to your organization in [month].

If you are able, and at your earliest convenience, please confirm for me you have received the previous email and consent form by returning it to me, signed, in an email. If you have questions or concerns regarding the project, please do get in touch. I am eager to hear your needs and to keep an open dialogue throughout this process. It is my intent to serve FORT-VI and its stakeholders to the best of my ability during our partnership.

Thank you, and hoping you are well.

Best,
Natasha Mihell

[email] / [phone number]
MPA Student, University of Victoria

Appendix D – Survey Email Script and Questions

Dear [FIRST NAME] [LAST NAME],

It was a pleasure to connect with you about FORT-VI's strategic plan! I look forward to developing this initiative alongside you and fulfilling the vision you and your colleagues have for Friends of Rails to Trails Vancouver Island.

I am now pleased to send you the link for the **FORT-VI Strategic Direction SurveyMonkey** [link attached to emboldened text]. SurveyMonkey is an approved software supported by the University of Victoria, which offers a seamless survey experience for you, and an efficient way for me to analyze the data I collect. You can find more information about SurveyMonkey [here](#).

Please be advised that this research study includes data storage in U.S.A. As such, there is a possibility that information about you that is gathered for this research study may be accessed without your knowledge or consent by the U.S. government, in compliance with the U.S. Freedom Act.

The survey will collect your responses anonymously and take approximately 20 minutes for you to complete. Please see the questions below, in advance:

Sample Survey Questions

(For HREB: Please note these are liable to be modified as the author develops her thesis. More attention will be paid here to internal and external challenges, and there will be, potentially, the inclusion of a SOAR analysis, etc..)

- What is your Vision for the Island Rail Corridor rail-trail? Share your purpose for pursuing this initiative.
- What challenges do you foresee the IRC rail-trail development will bring, and how do you intend to address these?
- In what ways do you intend to continue your consultation and engagement efforts with the communities impacted by the IRC?
- How do you plan to leverage the resources you already have?
- What contingencies do you have in mind should there be obstacles during the development of this project?
- Describe the future of rail-trails on Vancouver Island and beyond.
- Why this rail-trail, and why now?
- What do you expect this rail-trail will bring to the community one year after development is completed? Five years? Ten?
- What strategies have worked for your organization in the past? What strategies would you like to pursue in the future?
- What does the IRC rail-trail mean to Vancouver Island communities?
- In what ways have you considered First Nations' interests in this initiative so far, and in what ways would you commit to fulfilling these in the future?

Please feel free to reach out any time with any questions or concerns you may have. I am open to your feedback. Otherwise, I greatly appreciate the opportunity to work with you on this initiative and am very much looking forward to reading your responses.

Best,
Natasha Mihell

[email] / [phone number]
MPA Student, University of Victoria

Appendix E – Focus Group Email Script

Dear [FIRST NAME] [LAST NAME],

Thank you again for your time and interest in participating in the FORT-VI Strategic Direction Focus Group!

I wanted to connect with you to give you a sense of how the Focus Group will work and what you can expect from your time. Please feel free to reach out any time with any questions or concerns you may have regarding these. I am open to your feedback and am very much looking forward to hosting this discussion.

The Format

I will begin the focus group by asking for fifteen minutes of discussion around the proposal sent to the board, which all the board members will have seen by now. Following this discussion, there will be another fifteen minutes allotted for follow-up questions based upon what was said. Sample questions in this capacity might include:

- Why do you believe that aspect of the plan is more/less integral than others? Do your colleagues concur?
- If there is consensus regarding the purpose underlying this plan, then in what ways can we leverage that consensus in conversation with the communities we serve?
- If there is a general discord regarding the purpose underlying this plan, then what needs to be done to find alignment again? (This will undoubtedly prompt dialogue between two or more members of the group and myself.)

Following the discussion in the first thirty minutes of the focus group, my attention will turn to a follow-up discussion regarding the survey questions. The group will have ten minutes to respond to each question. This question and response period will therefore take one hour and forty minutes (1h40m). The total time from the start of the focus group to this point is two hours and ten minutes (2h10m).

I will allot twenty minutes (up to fifty minutes, should the discussion prove fruitful!) at the end of the question and response period for free discussion. During this time, any question that participants believe was not fully answered to their satisfaction may be addressed in greater depth. I will wrap the focus group up with a (heartfelt!) thank you for the participants' time, and a promise to keep the group apprised of my progress on the plan, and the thesis.

The second, and perhaps third, focus group, will follow a similar albeit more relaxed format. The updated plan will be sent ahead of each discussion, and the focus group will spend at minimum one hour in conversation about where we currently stand with the plan, and where we ought to go from here.

A gentle reminder re: the consent form that I will be recording (audio and video) and taking notes during each focus group. 😊

Again, please do get in touch if you have any questions or comments to make about the format or the sample questions below my signature. I greatly appreciate the opportunity to work with you

on this initiative and look forward to meeting you all virtually soon, on the date of your choosing!

Best,
Natasha Mihell

[email] / [phone number]
MPA Student, University of Victoria

Appendix F – Table 2: Individuals, Groups, or Organizations Affected by the Output

<i>Rightsholders: Indigenous Peoples Impacted by the E&N Rail-Trail and Related Projects</i>	<i>Stakeholders: Local Governments Impacted by the E&N Rail-Trail and Related Projects</i>
<ul style="list-style-type: none"> • Comox Indian Band/K’omoks First Nation • Qualicum First Nation • Tseshaht Band • Uchuklesaht Band • Huu-Ay-Aht First Nation • Nanoose First Nation • Nanaimo First Nation/Snuneymuxw First Nation • Chemainus First Nation • Cowichan Tribes • Iyackson First Nation • Malahat Indian Band • Songhees Indian Band • Lekwungen Nation • Beecher Bay First Nation/Scia’new • Tsartlip First Nation • Pauquachin First Nation • Tseycum First Nation • Tsawout First Nation • Esquimalt Nation 	<ul style="list-style-type: none"> • Government of British Columbia • District of Highlands • Town of View Royal • City of Colwood • Township of Esquimalt • District of Oak Bay • City of Victoria • Capital Regional District • Town of Sidney • District of North Saanich • District of Central Saanich • District of Saanich • District of Sooke • District of Metchosin • City of Langford • Cowichan Valley Regional District • Town of Ladysmith • Strathcona Regional District • Village of Zeballos • Village of Tahsis • Village of Gold River • Regional District of Mount Waddington • District of Port Hardy • Town of Port McNeill • Village of Port Alice • Village of Alert Bay • Village of Sayward • City of Campbell River • Town of Lake Cowichan • Municipality of North Cowichan • City of Duncan • Regional District of Nanaimo • City of Nanaimo • Town of Qualicum Beach • City of Parksville • District of Lantzville • Comox Valley Regional District • Village of Cumberland • Town of Comox • City of Courtenay

	<ul style="list-style-type: none"> • Alberni - Clayoquot Regional District • District of Tofino • District of Ucluelet • City of Port Alberni
<i>Stakeholders: Nonprofits and Corporations Impacted by the E&N Rail-Trail and Related Projects</i>	<i>Stakeholders: Others Potentially Interested in the E&N Rail-Trail and Related Projects</i>
<ul style="list-style-type: none"> • Destination BC Corp. • Comox Valley Project Watershed Society • Nature Conservancy of Canada • Northwest Wildlife Preservation Society • The Nature Trust of British Columbia • World Wildlife Fund Canada • Trails BC • Tourism Vancouver Island • Chemainus Valley Historical Society • Vancouver Island Visitor Centre/Experience Comox Valley • Local Chambers of Commerce 	<ul style="list-style-type: none"> • Rails to Trails Conservancy • Dr. Achim Bartoschek • Ontario Good Roads Association • New Mexico Rails-to-Trails Association • St. Margaret's Bay Rails to Trails Association

Appendix G – Link to Island Rail Corridor Condition Assessment Report (2020)

Find the full report here: [Vancouver Island Rail Corridor - Province of British Columbia \(gov.bc.ca\)](https://www2.gov.bc.ca/gov/content/transport/infrastructure/rail/ircc/ircc-report-2020).