

Oregon-California Trails Association



Strategic Plan

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Oregon-California Trails Association
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Strategic Plan

Introduction

The Oregon-California Trails Association (OCTA) observed its 25th anniversary of establishment in 2007. In addition to celebrating years of achievement in historic trail preservation, education, and scholarship, OCTA used the anniversary as an opportunity to set a direction for the future.

This strategic plan describes that future direction. The OCTA mission, vision, and broad goals for future achievement are included. These provide the foundation for a strategy of specific objectives and actions to be implemented. These actions are considered critical, and therefore of the highest priority, for realizing the OCTA mission.

This strategic plan is expected to have a five-year life span and will be reviewed annually at Board and Chapter meetings to guide work plans and track accomplishments. Timelines for implementing the actions within the next five years will be developed through a separate process.

Vision

The Oregon-California Trails Association is the pre-eminent guardian and promoter of the inspirational story of the 19th century westward American migration, which is unique in world history.

Mission

Our mission is to protect the Historic Emigrant Trails legacy by promoting research, education, preservation activities and public awareness of the trails, and to work with others to promote these causes.

Mission Goals

Four broad goals describe how OCTA will achieve its mission. These address trail preservation, partnerships, organizational effectiveness, and membership. Each goal is supported by objectives and implemental actions.

Goal 1. Preserve the historic emigrant trails

Goal 2. Be an effective historic trails organization through appropriate partnerships

Goal 3. Improve organizational and management effectiveness

Goal 4. Keep OCTA's base membership energized (Don't let the fires go out.)

Goal 1. Preserve the historic emigrant trails

To accomplish this goal, OCTA will:

Objective	Action	Lead*
A. Improve effectiveness of trails-related preservation activities.	i. Establish preservation organizations in each chapter.	Preservation Committee* Chapters
	ii. Provide appropriate training in mapping, marking and monitoring.	Preservation Committee*
	iii. Measure effectiveness through biannual reviews and reports.	Preservation Committee*
B. Assist stakeholders in the acquisition and preservation of trails-related resources.	i. Provide funding to address resource threats.	Board* Preservation Committee Chapters
	ii. Assist with monitoring trail-related resources.	Chapters*

Goal 2. Be an effective historic trails organization through appropriate partnerships

To accomplish this goal, OCTA will:

Objective	Action	Lead*
A. Expand our partnering scope with a wide variety of public and private entities in order to leverage OCTA's resources.	i. Communicate regularly with public land management staff, local and regional entities, other organizations, and private landowners to identify, develop, and promote projects.	Association Manager OCTA President Preservation Committee (*equal responsibility)
B. Partner with local and regional entities to provide and promote trails-related heritage activities and tourism.	i. Consult with local and regional entities to learn of opportunities, and provide subject matter expertise and access to on-the-ground resources.	Chapters and Board members* Staff
	ii. Develop and maintain heritage tours.	
	iii. Promote and support volunteering on trails-related federal agency projects.	

Objective	Action	Lead*
	iv. Publicize the volunteer opportunities through websites, chapter and national newsletters, direct mail, and email.	Publications Committee* Chapters and Board Staff
C. Understand (or consider) the goals and operation practices of partners so that OCTA's trails preservation strategies develop in concert with theirs.	i. Make certain a greater number of the leadership attends meetings with the Partnership for the National Trail System.	Board Committee Chairs Chapter Presidents
	ii. Meet whenever possible with agency partners.	Staff
	iii. Be familiar with and support partner agency strategic and resource plans.	OCTA President (*equal responsibility)
	iv. Lobby for congressional support and funding of federal agency trail administration and management.	Board Preservation Committee (*equal responsibility)
D. Cooperate with educational entities to develop trails-related curriculum-based materials.	i. Develop documentary film with PBS on children on the trails.	Documentary Committee*
	ii. Work with state and local school boards and teacher organizations to develop programs that meet curriculum needs.	Education Committee* Promotions Committee
	iii. Develop list of OCTA members with appropriate skills to work with or lead school field trips.	Association Manager
	iv. Develop online reading guides and summer reading lists for children.	Chapters
	v. Provide web links to online primary documents.	

Goal 3. Improve organizational and management effectiveness

To accomplish this goal, OCTA will:

Objective	Action	Lead*
A. Increase OCTA membership to 2,500 members to increase OCTA's funding and to expand the volunteer base.	i. Consult with experts to define and implement a marketing strategy to increase OCTA membership.	Marketing task force* Marketing firm
B. Maintain increased membership.	i. Fill the membership committee.	OCTA president*
C. Develop marketing tools within OCTA to promote trails.	i. Develop a prepared speech for local speakers to use to present a consistent message, which may be tailored locally.	Public Relations Committee*
	ii. Develop audio and video Public Service Announcements (PSA).	
D. Increase revenue to ensure the continued preservation of trails-related resources.	i. Fill the fundraising committee. (Duties: conduct/solicit convention revenue, appeals for general operating expenses, store sales, membership revenue and donations)	OCTA President*
E. Maintain and increase the Endowment Funds to assure financial health in the long term.	i. Seek donations, and work with Greater Kansas City Community Foundation to be sure investments are in the highest revenue generating funds (with least amount of risk).	Investments Advisory Committee*
		Fundraising Committee Board Officers Staff
F. Continue to hold annual conventions that attract membership and generate revenue.	i. Identify venues three years ahead.	Convention Future Sites Committee* Board
	ii. Look for ways to broaden appeal of conventions to attract wider audience in and outside OCTA membership.	Board OCTA President (*equal responsibility)
G. Fully fund the yearly operating expenses.	i. Find new sources of revenue through expanded memberships, grants, and partnerships.	Board* OCTA President Association Manager

Goal 4. Keep OCTA’s base membership energized (Don’t let the fires go out.)

To accomplish this goal, OCTA will:

Objective	Actions	Lead*
A. Increase benefits to provide value for members’ investment of time and money.	i. Provide virtual library as member benefit.	Library Committee* Staff
	ii. Provide COED database website as member benefit.	COED Committee*
B. Develop a committed highly energetic corps of volunteers to carry out the goals and objectives of OCTA partnership.	i. Involve members in training opportunities.	Committee Chairs* Chapters
	ii. Develop service-oriented activities to attract volunteers from outside OCTA membership.	Chapters* Committee Chairs
C. Develop new activities to maintain an engaged membership.	i. Widen scope of tours, speaker programs, and volunteer activities.	Chapters* Committee Chairs Staff
D. Improve communication to maintain an informed, active membership.	i. Support networking through digital communication (such as Yahoo Overland Tails chat list).	Staff* Board Chapters Committee Chairs Publications Committee Public Relations Committee
		ii. Expand E-news at both chapter and national levels.
	iii. Fully fund the maintenance of OCTA's website at current technological standards.	Publications Committee*

Planning Process

The OCTA Board of Directors held a strategic planning work session on March 17, 2006, in Phoenix, Arizona. Both board members and chapter presidents participated in the work session, which was facilitated by Sharon Brown of the National Park Service's National Trails System-Intermountain Region.

A small working committee, the "Long Range Planning Committee," composed of three OCTA members (Richard Pingrey, Loren Pospisil, Marley Shurtleff, with Travis Boley serving *ex officio* and Sharon Brown continuing as facilitator) further refined the March 17 work session results. During its meeting on August 8, 2006, at St. Joseph, Missouri, the OCTA board approved distribution of the draft plan to the general membership and partners for review and comment.

The draft plan was on review from late August to early November, 2006. Hard copies were made available, and a digital version was posted on the OCTA website. Seventeen sets of comments were received from OCTA members and partners. While some comments were complimentary, others questioned the draft plan's size and scope. Based on these comments, the Long Range Planning Committee subsequently revised the document. After consultation with OCTA committee chairs, the decision was made to address organizational capacity by focusing on previously-identified high priority actions (with a few exceptions). The revised, but greatly reduced plan was presented to the OCTA board and chapter presidents for adoption at the mid-year board meeting, held in Independence, Missouri, on March 3, 2007.

OCTA's On-going Efforts

While the actions described in the charts above were determined to be of highest priority in the next five years, there are still other important activities that are on-going and conducted year-round and organization-wide. Many of these activities were identified during the 2006-2007 planning process, and are documented in a separate Strategic Plan Archive (March 3, 2007). These represent the wide range of activities, all in support of the OCTA mission, undertaken by dedicated OCTA volunteer members each year.