Oregon-California Trails Association

Strategic Plan
2015-2020

Adopted September 21, 2015

Oregon-California Trails Association
P.O. Box 1019 Independence, MO 64051-0519

Strategic Plan

Introduction

The Oregon-California Trails Association (OCTA) observes its 35th anniversary of establishment in 2015. OCTA's strategic plan was last updated in 2010. Since that time OCTA has achieved much in the areas of historic trail preservation, education, and scholarship. In 2015, OCTA is updating the strategic plan to assess current achievements and accomplishments, and review directions 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 time frame and will be reviewed biennially at Board meetings to guide work plans and track accomplishments. Chapters are encouraged to review chapter goals and activities for compliance with the national association plan.

Vision

The Oregon-California Trails Association is the pre-eminent guardian and promoter of the inspirational story of the 19th century westward 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

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

Goal 1. Preserve the historic emigrant trails
Goal 2. Preserve and promote the stories of the emigrant experience
Goal 3. Be an effective historic trails organization through appropriate partnerships
Goal 4. Improve organizational and management effectiveness
Goal 5. 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**	**Time**	**Lead***
A. Improve effectiveness of trails-related preservation activities. Identify, class and map historic emigrant trails.	i. Establish preservation organizations and chapter preservation officers in each chapter.	2015-2020 ongoing	Preservation Committee Chapters
	ii. Provide appropriate training in preservation, mapping, marking, and monitoring and use of the MET Manual.	2015-2020 ongoing	Preservation Committee Mapping & Marking Comm. Chapters Mapping Teams
	iii. Measure effectiveness through semi-annual reviews and reports	2015-2017 ongoing	Preservation Committee Chapters
	iv. Develop specific action plan to respond to threats (identify partner organizations; communication strategy; media relations plan; funding; assess projects)	by 2016	Preservation Committee PR/Marketing Committee Staff Chapters
	v. Communicate with stakeholders and agencies regarding OCTA's role as a partner in dealing with and identifying threats to trail preservation.	2015-2017 ongoing	Preservation Committee PR/Marketing Committee Staff Chapters
B. Assist stakeholders in the acquisition and preservation of trails-related resources.	i. Obtain and provide funding to address resource threats.	2015-2017 ongoing	Board Association Manager Preservation Committee Chapters Fundraising Committee Investment Advisory Comm.
	ii. Assist with monitoring trail-related resources.	2015-2017	Chapters Preservation Committee
C. Support expansion of national historic trails within the National Trails System.	i. Support the "Additional Routes of the Oregon, Mormon Pioneer, California, and Pony Express Feasibility Study Update and Revision" by reviewing, commenting and advocating.	2016	Association Manager Chapters Legislative Liaison
	ii. Support and promote feasibility study sponsorship for the Southern Trails to California.	by 2020	Southern Trails Chapter Legislative Liaison Board
D. Anticipate, identify and respond to trail threats	i. Develop specific action plan to respond to threats (identify partner organizations; communication strategy; media relations plan; funding; assess projects).	by 2016	Preservation Committee PR/Marketing Committee Staff Chapters
	ii. Communicate with stakeholders and agencies regarding potential threats and OCTA's desire to be included.		

Goal 2. Preserve and promote the stories of the emigrant experience. To accomplish this goal, OCTA will:			
Objective	**Action**	**Time**	**Lead***
A. Improve and expand data collection	i. Amass data (books, literature, maps, diaries, etc.) related to trail experience.	by 2017 review and then ongoing	Publications Committee Collections Committee
	ii. Develop a warehouse of information (physically and digitally).	by 2017	Collections Committee Staff
	iii. Make publications available -improve website for public access (make resources known).	By 2017	Website Coord. Committee Publications Committee Staff PR/Marketing Committee
	iv. Inventory and improve access to OCTA library collections.	By 2017	Collections Committee Staff
	v. Expand online journal offerings.	By 2017	Education Outreach Comm. Publications Committee Collections Committee
	vi. Optimize use of COED and Paper Trail.	By 2017	Website Coord. Committee Staff
	vii. Receive and provide training in research methods.	By 2017	Education Outreach Comm. Staff
	viii. Expand listing sessions with Tribes.	By 2017	Tribal Liaison
B. Raise public awareness.	i. Make publications available.	2015-2020 ongoing	Publications Committee Education Outreach Comm. Staff Website Coord. Committee
	ii. Expand speakers' bureau.	by 2017	PR/Marketing Committee Association Manager Chapters
	iii. Create audio visual materials.	by 2017	PR/Marketing Committee Staff Education Outreach Comm.
	iv. Create expanded outreach materials.	by 2017	Education Outreach Comm. PR/Marketing Committee Staff
	v. Improve use of social media. Maintain an active, current, and dynamic web site presence.	by 2017	Website Coord. Committee Staff PR/Marketing Committee
	vi. Use conventions/symposia to better relate emigrant histories.	by 2017	PR/Marketing Committee Association Manager Convention Management committee

Goal 3. Be an effective historic trails organization through appropriate partnerships To accomplish this goal, OCTA will:			
Objective	**Action**	**Time**	**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 SHPO, public land management staff, local and regional entities, tribal communities, other organizations, and private landowners to identify, develop, and promote projects.	2015-2020 ongoing	Association Manager President Chapters Preservation Committee Tribal Liaison Committee (*equal responsibility)
	ii. Encourage the leadership to attend meetings with the Partnership for the National Trail System.	2015-2020 ongoing	PNTS Representative
	iii. Meet and invite whenever possible with agency partners to attend (OCTA/Partnership) sponsored events.		
	iv. Be familiar with and support partner agency strategic and resource plans.		
	v. Advocate for congressional support and funding of federal agency trail administration and management.	2015-2020 ongoing	Board Chapters Legislative Liaison
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.	2015-2020 ongoing	Chapters Board members Association Manager
	ii. Develop and maintain relationships with tourism and historical societies.	2015-2020 ongoing	Association Manager Chapters
	iii. Promote and support volunteering on trails-related federal agency projects.	2015-2020 ongoing	PR/Marketing Committee Association Manager Chapters
	iv. Publicize volunteer opportunities and results through websites, chapter and national newsletters, direct mail, and email.	2015-2020 ongoing	Publications Committee Chapters Board Staff

Goal 3. Be an effective historic trails organization through appropriate partnerships To accomplish this goal, OCTA will:			
Objective	**Action**	**Time**	**Lead***
C. Cooperate with educational entities and with others to develop trails-related curriculum-based materials.	i. Market documentary film with young people on the trails.	By 2016	Education Outreach Comm. PR/Marketing Committee Staff Website Coord. Committee
	ii. Work with state and local school boards, teachers, educational organizations, and youth related groups to develop programs that meet curriculum or their needs.	2015-2020 ongoing	Education Outreach Comm. PR/Marketing Committee Association Manager Chapters
	iii. Develop list of chapter or OCTA members with appropriate skills to work with education and preservation activities or groups (lead field trips.)	by 2017	Education Outreach Comm. Chapters
	iv. Develop online reading guides and summer reading lists for young people.	2016	Education Outreach Comm. Publications Committee Website Coord. Committee
	v. Develop electronic tools to augment educational opportunities (social media, videos, etc.).	2015-2020 ongoing	Education Outreach Comm. Staff PR/Marketing Committee

Goal 4. Improve organizational and management effectiveness To accomplish this goal, OCTA will:			
Objective	**Action**	**Time**	**Lead***
A. OCTA membership to increase OCTA's funding and to expand the volunteer base.	i. Define and implement a marketing strategy to increase OCTA membership.	by 2016	Membership Committee Chapters PR/Marketing Committee Association Manager
	ii. Provide incentives to join OCTA (access to OJ, In Pursuit of a Dream) (Reach out to the community).		
	iii. Send letters to service organizations offering to speak to their organizations. Improve contacts with service organizations.	by 2016	Chapters Education Outreach Comm.
	iii. Be represented at ancillary symposiums and conventions. (Staff a booth.)	by 2016	Staff and appropriate committees
	iv. Develop regional videos for presentations (on OCTA, trail projects/resources in the area).	by 2016	Education Outreach Comm. PR/Marketing Committee Chapters Staff
B. Maintain increased membership.	i. Fill the membership committee.	by 2016	Membership Committee Chapters
	ii. Send out renewal reminders.		
	iii. Appoint a chapter membership chair.		
C. Develop marketing tools within OCTA to promote trails.	i. Develop a comprehensive marketing plan.	by 2016	PR/Marketing Committee Association Manager
	ii. Place articles in AARP/AMAC.		
	iii. Look for new audiences (such as schools or BSA).	by 2016	Education Outreach Comm. PR/Marketing Committee
D. Increase revenue to insure the continued preservation of trails-related resources.	i. Fill the fundraising committee.	by 2016	President Fundraising Committee Association Manager
	ii. Request funds to support specific projects to complement an action plan.	by 2016	Association Manager President
	iii. Increase revenue from publication sales.	by 2016	Publications Committee
E. Maintain and increase the Endowment Funds to assure financial health in the long term.	i. Seek donations to Legacy Funds	2015-2020 ongoing	Fundraising Committee Board Officers Staff
	ii. Work to be sure investments are in the highest revenue generating funds (with least amount of risk.)	2015-2020 ongoing	Investments Advisory Committee

Goal 4. Improve organizational and management effectiveness To accomplish this goal, OCTA will:			
Objective	**Action**	**Time**	**Lead***
F. Continue to hold annual conventions that attract membership and generate revenue.	i. Identify venues three years ahead.	2015-2020 ongoing	Convention Future Sites Committee* Convention Management Committee Association Manager
	ii. Implement convention management committee recommendations regarding financial controls	2015-2020 ongoing	Convention Management Committee Association Manager
	iii. Look for ways to broaden appeal of conventions to attract wider audience in and outside OCTA membership.	2015-2020 ongoing	Convention Management Committee Host Chapters Association Manager
	iv. Invite community participation		
	v. Establish and utilize the speakers' bureau.	2015-2020 ongoing	Chapters PR/Marketing Committee
	vi. Identify opportunities for regional trails symposia.	2015-2020 ongoing	Association Manager Convention Management Committee Chapters
G. Fully fund the yearly operating expenses.	i. Find new sources of revenue through expanded memberships, grants, and partnerships.	by 2016	Board President Association Manager (*equal responsibility)
	ii. Seek operating efficiencies to manage financial resources effectively.		
H. Ensure board member and committee orientation and training	i. Provide training and orientation	by 2016	President and VP HQ Staff and Chairs Policy/Governance Committee
	ii. Update policies and procedures manual (consolidate, make accessible, summary of board actions).		
I. Provide staff oversight	i. Complete Headquarters Operations Review	by 2016	President Committee C Task Force Staff
	ii. Conduct annual staff evaluations		

Goal 5. Keep OCTA's base membership energized (Don't let the fires go out.) To accomplish this goal, OCTA will:			
Objective	**Action**	**Time**	**Lead***
A. Increase benefits to provide value for members' investment of time and money.	i. Continue to improve and update website resources.	2015-2020 ongoing	Website Coord. Committee* Staff
	ii. Identify new added-value opportunities exclusive to members.		Membership Committee* Association Manager PR/Marketing Committee
B. Develop a committed highly energetic corps of volunteers to carry out the goals and objectives of OCTA partnership.	i. Involve members and potential members in training opportunities.	2015-2020 ongoing	Committee Chairs* Association Manager Chapters
	ii. Develop service-oriented activities to recruit volunteers from within and outside OCTA membership.		
C. Develop new activities to maintain an engaged membership.	i. Widen scope of tours, speaker programs, and volunteer activities.	2015-2020 ongoing	Chapters* Committee Chairs Staff
D. Improve communication to maintain an informed, active membership.	i. Support networking through digital communication and social media.	2015-2020 ongoing	Staff* Board Chapters Committee Chairs Website Coord. Committee PR/Marketing Committee Education Outreach Comm.
	ii. Expand E-news at both chapter and national levels.		Association Manager Chapters PR/Marketing Committee
	iii. Fully fund the maintenance of OCTA's website at current technological standards		Website Coord. Committee
	iv. Utilize, maintain, and expand publications and publication opportunities.		Publication Committee

On March 5, 2015, Denver, Colorado, the OCTA Board of Directors held a review session of the 2010 Strategic Plan. Board members, chapter presidents and committee chairs participated in the review, facilitated by Gretchen Ward, assisted by John Cannella, of the National Park Service's National Trails Intermountain Region.

During the March 2015 session, participants in the strategic planning session added a new goal addressing OCTA's desire to increase efforts to more effectively interpret the stories of the emigrants along the Oregon and California Trails.

OCTA's On-going Efforts

While the actions described in the charts above were determined to be of highest priority, 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 2010 planning process, and were 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. That plan was updated on March 5, 2010.