

Oregon-California Trails Association

Strategic Plan 2020-2025



**DRAFT for OCTA Member Review
06/12/2020**

Adopted September XX, 2020
P.O. Box 1019 Independence, MO 64051-0519

Oregon-California Trails Association Strategic Plan

Introduction

OCTA's strategic plan describes its future direction. The OCTA mission, vision, and goals for future achievement 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 semi-annually 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 will continue to be the pre-eminent guardian and promoter of the inspirational story of America's 19th century westward migration, which is unique in world history.

Mission

Our mission is to protect the **historic emigrant trails** legacy by promoting public awareness of the trails through research, education and preservation activities; by achieving organizational sustainability; and by partnering with others.

Mission Goals

Five broad goals describe how OCTA will achieve its mission. Each goal is supported by objectives, implemental actions, responsible entities, and desired conditions or deliverables.

These are presented in random order (not prioritized).

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 effectiveness and sustainability

Goal 5. Keep OCTA's membership energized and informed

Goal 1. Preserve the historic emigrant trails

Objective	Action	Lead	Outcome/Deliverable
A. Identify, class, map, and mark historic emigrant trails.	i. Provide appropriate training in preservation, mapping, marking, and monitoring and use of the MET Manual.	Preservation Committee Chair, Mapping & Marking Committee Chair, Chapters	OCTA-wide training is provided with participation by each chapter.
	ii. Establish chapter mapping teams.	Chapters	Emigrant trails located in chapter regions are mapped to MET standards with primary emphasis on condition and location.
B. Assist stakeholders in the protection and preservation of trail resources.	i. Assist with monitoring trail resources and funding needs.	Preservation Committee Chair, Chapters	OCTA members volunteer with monitoring projects as needed. Funds are available and/or applied to a trail resource threat.
C. Support expansion of OCTA-related national historic trails within the National Trails System.	i. Advocate for congressional legislation to add the “Additional Routes” as NHTs.	Legislative Liaison, Chapters	Congress authorizes the NPS recommended “Additional Routes” as NHTs.
	ii. Advocate for congressional sponsorship of feasibility studies for a Southern Trails to California NHT.	Southern Trails Chapter, Legislative Liaison	Congressional legislation is passed authorizing a Southern Trails to California NHT feasibility study by 2025.
D. Anticipate, identify, and respond to trail and trail marker threats.	i. Establish preservation officers/contact in each chapter.	Chapters	Each chapter has an active preservation officer by 2021.

Goal 2. Preserve and promote the stories of the emigrant experience

Objective	Action	Lead	Outcome/Deliverable
A. Improve and expand data collection.	i. Make publications, diaries and journals available through improved website for public access.	Website Coordination Committee Chair, Publications Committee Chair, Education Outreach Committee, Collections Committee	Trails-related publications, diaries and journals are digitized and posted to the OCTA website annually.
	ii. Inventory and improve access to OCTA library collections.	Collections Committee Chair	OCTA library collections are inventoried and deposited into publicly accessible repositories by 2025.
B. Raise public awareness.	i. Expand availability of organizational speakers.	PR/Marketing Committee Chair , Chapters	National will assist chapters to offer presentations in their communities.
	ii. Create audio visual materials.	PR/Marketing Committee Chair, Education Outreach Committee, Mapping and Marking Committee	One audio visual product is created and posted to the OCTA website annually.
	iii. Create expanded outreach materials.	PR/Marketing Committee Chair, Education Outreach Committee Chair	One outreach product is created and posted to the OCTA website annually.
	iv. Expand use of social media.	Association Manager, Website Coordination Committee, PR/Marketing Committee	OCTA Twitter feed and Instagram posts are initiated by 2021; website and Facebook are active and kept current monthly.

Goal 3. Be an effective historic trails organization through appropriate partnerships

Objective	Action	Lead	Outcome/Deliverable
A. Leverage OCTA's resources through partnerships.	i. Identify, develop, and promote partnership opportunities.	President, Chapters, Association Manager	One new project-related partnership is established annually.
	ii. Advocate for congressional support and funding of federal agency trail administration and management.	Legislative Liaison, President, Board, Chapters	Attend Hike the Hill event annually. Each congressional representative whose district or state contains a national historic trail is kept informed annually about the trails and OCTA.
B. Partner with local and regional entities to provide and promote trails-related heritage activities and tourism.	i. Consult with local and regional entities (including tourism and historical societies) to learn of opportunities, and provide subject matter expertise and access to on-the-ground resources.	Chapters, Board, Association Manager	Promote and/or attend a local trails-related event and peripherally related events annually.
	ii. Promote and support volunteering on trails-related federal, state, and local agency projects.	PR/Marketing Committee, Association Manager, Chapters	OCTA members and the general public participate in one trails-related federal, state, and local agency project annually.
	iii. Publicize volunteer opportunities and results through websites, chapter and national newsletters, direct mail, and email.	Chapters, Association Manager	OCTA members and the general public learn about at least two trails-related projects annually, through use of local media outlets and publications.
C. Cooperate with educational	i. Work with state and local school boards,	Education Outreach Committee Chair,	At least one new trails-related

entities and with others to participate in trails-related curriculum-based activities.	teachers, educational organizations, and youth related groups to participate in programs that meet curricula or their needs.	Association Manager, Chapters and Members	curriculum is developed through an educational partnership as needed and one more district starts using curriculum. OCTA members are available to participate in educational activities such as National History Day.
	ii. Develop list of Chapter or OCTA members with appropriate abilities to work with education and preservation activities or groups (lead field trips.)	Education Outreach Committee Chair, Chapters	OCTA members with appropriate abilities are encouraged to work with education and outreach partners.
	iii. Compile online reading guides and summer reading lists for young people.	Education Outreach Committee Chair	An online reading guide and summer reading list is compiled and posted on the OCTA website and published in the News From The Plains.

Goal 4. Improve organizational effectiveness and sustainability

Objective	Action	Lead	Outcome/Deliverable
A. Ensure financial stability.	i. Hire a Director of Development.	Board, Fund Raising Committee, Staff	Funding is secured and a director is hired before 2025.
	ii. Conduct Major Gifts Campaign and increase Annual Giving.	Board, Fund Raising Committee, Staff, Chapter Leadership, PR Committee, Membership Committee	Twenty five donors at \$1,000 and 40 donors at \$500 are secured annually before 2025.
	iii. Conduct Capital Campaign.	Board, Fund Raising Committee, Staff	\$300,000 is raised incrementally by 2025.
	iv. Secure Corporate Memberships	Board, Fund Raising, and PR Committees, Staff, Chapters	Twenty corporate members at \$1,200 year are secured by 2025.
	v. Secure Grants for specific projects.	Board, Fund Raising Committee, Staff	Funds are obtained as needed.
	vi. Increase Trails Legacy Society membership	Board, Fund Raising and PR Committees, Staff	Twenty new Trails Legacy Society members are added annually.
	vii. Hold annual conventions that generate revenue.	Association Manager, Chapters	Convention expenses are within budget and revenue-generating activities are promoted.
B. Develop leadership abilities of OCTA members.	i. Provide training and orientation for officers, board members, and committees to develop leaders within OCTA.	President, Staff , Governance Committee, Board	Members have guidance, support, and range of training opportunities available to them.
C. Increase OCTA's membership to grow funding and expand the volunteer base.	i. Implement a marketing strategy to attract new members.	PR/Marketing Committee Chair, Association Manager, Membership Committee	There is a two percent increase in new memberships annually.
	ii. Increase community outreach through speaking opportunities and attendance at	Chapters, Education Outreach Committee, Staff	OCTA members participate in speaking engagements and

	related stakeholder activities.		local stakeholder activities annually.
D. Increase member retention.	i. Recognize long time members.	Membership Committee, Publications Committee, Chapters	Longtime members are acknowledged each year.
	ii. Manage membership renewals through automation.	Membership Committee, Staff	Memberships are managed through automation, saving staff time and expense by 2025.
	iii. Encourage membership activity participation.	Chapters	Membership retention is improved.
E. Assure that OCTA chapters are active and growing.	i. Help OCTA chapters be healthy and sustainable.	Chapter Committee, OCTA Leadership, Association Manager	OCTA chapters have growing, active memberships.
F. Simplify administrative handling of funds.	i. Review processes and software programs available to address dues collection and distribution of funds.	Staff, Chapters	There is better communication between members, Chapters and Headquarters.

Goal 5. Keep OCTA’s membership energized and informed

Objective	Action	Lead	Outcome/Deliverable
A. Develop new activities to maintain an engaged membership.	i. Support chapters in providing tours, speaker programs and volunteer activities for members.	Chapter Liaison, Committee Chairs, Staff, Chapters	Members have a choice of two or more chapter activities for engagement each year.
B. Improve internal communication to maintain an informed, active membership.	i. Support networking through digital communication and social media.	Staff, Board, Chapters	OCTA members have access to a range of digital media to learn of national and chapter news and activities by 2025.
	ii. Expand E-news at both chapter and national levels.	Association Manager, Chapters, PR/Marketing Committee	National and chapters post an E-news to members as generated.
	iii. Fund the maintenance and enhancement of OCTA’s website.	Website Coordinating Committee Chair	Adequate funding will be provided in the OCTA budget annually to support website maintenance and growth.
	iv. Share chapter newsletters with each chapter president.	Chapter presidents	Program ideas and chapter activities are shared among all OCTA chapters.