

# Oregon-California Trails Association

## Strategic Plan 2020-2025



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# 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**

Six 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.** Present the stories of the emigrant experience in a manner that is inclusive of other perspectives

**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 6.** Promote membership growth

## 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	<b>OCTA-wide training is provided with participation by each chapter.</b>
	ii. Establish chapter mapping teams.	Chapters*	<b>Emigrant trails located in chapter regions are mapped to MET standards with primary emphasis on condition and location.</b>
B. Assist stakeholders in the protection and preservation of trail resources.	i. Assist with monitoring trail resources and funding needs.	Preservation Committee Chair*, Chapters	<b>OCTA members volunteer with monitoring projects as needed. Funds are available and/or applied to a trail resource threat.</b>
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	<b>Congress authorizes the NPS recommended “Additional Routes” as NHTs.</b>
	ii. Advocate for congressional sponsorship of feasibility studies for a Southern Trails to California NHT.	Southern Trails Chapter*, Legislative Liaison	<b>Congressional legislation is passed authorizing a Southern Trails to California NHT feasibility study by 2025.</b>
D. Anticipate, identify, and respond to trail and trail marker threats.	i. Establish preservation officers/contact in each chapter.	Chapters*	<b>Each chapter has an active preservation officer by 2021.</b>

**Goal 2. Present the stories of the emigrant experience in a manner that is inclusive of other perspectives**

<b>Objective</b>	<b>Action</b>	<b>Lead*</b>	<b>Outcome/Deliverable</b>
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	<b>Trails-related publications, diaries and journals are digitized and posted to the OCTA website annually.</b>
	ii. Inventory and improve access to OCTA library collections.	Collections Committee Chair*	<b>OCTA library collections are inventoried and deposited into publicly accessible repositories by 2025.</b>
B. Raise public awareness.	i. Expand availability of organizational speakers.	PR/Marketing Committee Chair* , Chapters	<b>National will assist chapters to offer presentations in their communities.</b>
	ii. Create audio visual materials.	PR/Marketing Committee Chair*, Education Outreach Committee, Mapping and Marking Committee	<b>A minimum of 15 videos of two - five minutes in length are posted on websites and social media by 2025.</b>
	iii. Develop a Social Media Plan and other outreach materials.	PR/Marketing Committee Chair*, Education Outreach Committee Chair	<b>Social Media Plan would identify an outreach product to be created and posted to the OCTA website annually.</b>
	iv. Expand use of social media.	Association Manager*, Website Coordination Committee, PR/Marketing Committee	<b>OCTA Twitter feed and Instagram posts are initiated by 2021; website and Facebook are active and kept current monthly.</b>

### 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	<b>One new project-related partnership is established annually.</b>
	ii. Advocate for congressional support and funding of federal agency trail administration and management.	Legislative Liaison*, President, Board, Chapters	<b>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>
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	<b>Promote and/or attend a local trails-related event and peripherally related events annually.</b>
	ii. Promote and support volunteering on trails-related federal, state, and local agency projects.	PR/Marketing Committee*, Association Manager, Chapters	<b>OCTA members and the general public participate in one trails-related federal, state, and local agency project annually.</b>
	iii. Publicize volunteer opportunities and results through websites, chapter and national newsletters, direct mail, and email.	Chapters*, Association Manager	<b>OCTA members and the general public learn about at least two trails-related projects annually, through use of local media outlets and publications.</b>
C. Cooperate with educational	i. Work with state and local school boards,	Education Outreach Committee Chair*,	<b>At least one new trails-related</b>

<p>entities and with others to participate in trails-related curriculum-based activities.</p>	<p>teachers, educational organizations, and youth related groups to participate in programs that meet curricula or their needs.</p>	<p>Association Manager, Chapters and Members</p>	<p><b>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.</b></p>
	<p>ii. Develop list of Chapter or OCTA members with appropriate abilities to work with education and preservation activities or groups (lead field trips.)</p>	<p>Education Outreach Committee Chair*, Chapters</p>	<p><b>OCTA members with appropriate abilities are encouraged to work with education and outreach partners.</b></p>
	<p>iii. Compile online reading guides and summer reading lists for young people.</p>	<p>Education Outreach Committee Chair*</p>	<p><b>An online reading guide and summer reading list is compiled and posted on the OCTA website and published in the News From The Plains.</b></p>

## 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	<b>Funding is secured and a director is hired before 2025.</b>
	ii. Conduct Major Gifts Campaign and increase Annual Giving.	Board*, Fund Raising Committee, Staff, Chapter Leadership, PR Committee, Membership Committee	<b>Twenty five donors at \$1,000 and 40 donors at \$500 are secured annually before 2025.</b>
	iii. Conduct Capital Campaign.	Board*, Fund Raising Committee, Staff	<b>\$300,000 is raised incrementally by 2025.</b>
	iv. Secure Corporate Memberships	Board*, Fund Raising, and PR Committees, Staff, Chapters	<b>Twenty corporate members at \$1,200 year are secured by 2025.</b>
	v. Secure Grants for specific projects.	Board*, Fund Raising Committee, Staff	<b>Funds are obtained as needed.</b>
	vi. Increase Trails Legacy Society membership	Board*, Fund Raising and PR Committees, Staff	<b>Twenty new Trails Legacy Society members are added annually.</b>
	vii. Hold annual conventions that generate revenue.	Association Manager*, Chapters	<b>Convention expenses are within budget and revenue-generating activities are promoted.</b>
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	<b>Members have guidance, support, and range of training opportunities available to them.</b>
C. Simplify administrative handling of funds.	i. Review processes and software programs available to address dues collection and distribution of funds.	Staff*, Chapters	<b>There is better communication between members, Chapters and Headquarters.</b>

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



## Goal 6. Promote Membership Growth

Objective	Action	Lead*	Outcome/Deliverable
A. Develop an outreach program that attracts the next generation.	i. Create a youth council.	Chairman/Committee appointed by the President*	<b>Youth input used to guide development of activities, social media content, marketing, etc. that will attract diverse and younger audiences.</b>
B. Increase OCTA's membership to grow funding and expand the volunteer base.	i. Implement a marketing strategy to attract diverse and/or younger new members.	PR/Marketing Committee Chair*, Association Manager, Membership Committee	<b>There is a two percent increase in new memberships annually.</b>
	ii. Increase community outreach through speaking opportunities and attendance at related stakeholder activities.	Chapters*, Education Outreach Committee, Staff	<b>OCTA members participate in speaking engagements and local stakeholder activities annually.</b>
C. Increase member retention.	i. Recognize long time members.	Membership Committee*, Publications Committee, Chapters	<b>Longtime members are acknowledged each year.</b>
	ii. Manage membership renewals through automation.	Membership Committee*, Staff	<b>Memberships are managed through automation, saving staff time and expense by 2025.</b>
	iii. Encourage membership activity participation.	Chapters*	<b>Membership retention is improved.</b>
D. Ensure that OCTA chapters are active and growing.	i. Develop and issue guidelines for growing chapter membership.	Chapter Committee*, OCTA Leadership, Association Manager	<b>Guidelines are developed and applied in each chapter within a year.</b>