



*Pacific Crest Trail Association*  
*2007-2009 Strategic Plan*  
*Approved: July 15, 2006*

---

## **Introduction**

The Pacific Crest Trail Association (PCTA) is a membership organization formed to protect, preserve and promote the Pacific Crest National Scenic Trail. The PCTA was incorporated in 1977 and merged from the volunteer efforts of the Pacific Crest Trail Conference and Pacific Crest Trail Club. The organization is the public complement to the US Forest Service, National Park Service, Bureau of Land Management and California State Parks, and a major partner in the management and operations of the Pacific Crest National Scenic Trail.

## **Strategic Planning Process**

As part of the planning process, the Association first gathered ideas and input from key stakeholders whose connection to the Association and perspectives on trail issues would be helpful to retreat participants. Three focus groups met in Portland, Ontario, and San Francisco to provide opinions on the trail's strengths, key issues and concerns, key trends to consider, feedback to the Association and its operations, suggested roles for the Association, and advice to the Association. Three opinion leaders also participated through telephone interviews.

With the information gathered from the stakeholders, the board, staff and invited guests then met in Santa Clarita, California for two days to better understand the issues facing the PCTA and to develop a plan of action to guide its work over the next three years. This retreat represented a major investment in building the infrastructure and capacity of the organization, and was an initial step in organizational development that will also include board development and comprehensive fundraising planning.

The key issues that emerged in the planning retreat were the fundamental roles of the Association, how to best support land acquisition and trail management, and building the capacity of the PCTA. The strategic planning committee used the findings of the retreat to finalize the organization's strategic plan, which was then adopted by the board.

# *Pacific Crest Trail Association*

## *2007-2009 Strategic Plan*

*Approved: July 15, 2006*

### **Conclusions and Focus**

The PCTA is preparing itself to grow to the next level of capacity and expand our capabilities as an organization to serve the needs of the Pacific Crest Trail and those that support it. Several key initiatives will lead us to that new level, and are incorporated into this plan.

- We will expand the involvement and support of members and volunteers across the entire trail. New structures and staffing will be created to engage volunteers in trail acquisition, development and maintenance.
- We will grow the financial support for both the PCT and the PCTA. Through ongoing advocacy efforts we will work to keep public agencies focused on the Trail. Through membership and donor development we will strengthen the constituency of people who see support of the PCTA as a strategic and worthwhile investment.
- We will work to grow awareness among a broader constituency that is touched by the values of the Trail. More outreach, more education, more involvement of people who don't consider themselves "hard core trail users," but see the benefit of an international resource like the Pacific Crest Trail.

### **Vision Statement**

The Pacific Crest Trail Association has a vision for the future of the Pacific Crest Trail and a vision for the future of our organization. Our vision for the future includes:

- The Pacific Crest Trail is a permanently protected trail through wilderness and other public lands that is treasured by equestrians and hikers as a quiet, natural refuge that provides a high quality user experience.
- The Pacific Crest Trail Association has a local presence all along the trail and serves as the Trail's champion, helping others to appreciate the PCT as a public resource. The PCTA is recognized for its professional capability and is supported by dedicated volunteers, members and donors throughout the world.

### **Mission Statement**

The mission of the Pacific Crest Trail Association is to protect, preserve and promote the Pacific Crest National Scenic Trail as an internationally significant resource for the enjoyment of hikers and equestrians, and for the value that wild and scenic lands provide to all people.

# *Pacific Crest Trail Association*

## *2007-2009 Strategic Plan*

*Approved: July 15, 2006*

### **Values of the PCTA**

Although there are many important principles that guide our work, the Pacific Crest Trail Association emphasizes the following values as core to our efforts:

- ***The Leadership and Contribution of People*** – The great work of the Trail is a result of past leaders and visionaries who took a dream and made it happen. Today, that same leadership is provided by loyal volunteers throughout the organization and is supported by a professional, committed staff that builds on the integrity of the other leaders within the Association.
  
- ***Collaboration*** – The Association works in positive and cooperative partnerships to make the most of resources available to the organization. We are committed to mutual trust and respect with our partners, and resolve differences when they may emerge with respect and civility every time.
  
- ***Integrity*** – We understand that our success and reputation depends on our integrity as an organization, and therefore use consistent, reliable decision-making to guide our efforts. We apply common sense and good judgment to our work, and recognize our essential responsibility to use contributions and resources to best support the needs of the Trail.
  
- ***Stewardship*** – We take seriously our responsibility to steward the resources of the Trail and the organization for the benefit of all, including future generations. We value the incredible contributions made by the volunteer corps involved with the trail. We commit to build even greater community involvement and “ownership” to the work of the Association and the Trail itself.



**Goal I.** The PCT corridor is permanently protected for hikers & equestrians.

Strategies	Benchmarks	Status
A. Provide leadership and collaborate in efforts to acquire land for the trail and its corridor.	1. A program plan for PCT land acquisition is in place by 2 <sup>nd</sup> Quarter 2007.	In progress – Deferred to 2 <sup>nd</sup> Quarter 2008. <i>First draft of plan presented to committee on 1/8/08. Committee assignments were made and full plan will be complete by 5/1/2008.</i>
B. Ensure proper design of the trail corridor.	2. PCTA is positioned to take a lead role in PCT land acquisition projects by 4 <sup>th</sup> quarter 2007.	In progress – Land Acquisition Program Plan needed first (see benchmark 1 above). <i>The draft plan will include a section on pilot projects. The committee will develop criteria for pilot projects and recommendations for selecting pilot projects. Deadline for selecting pilot projects is 3/14/2008.</i>
C. Support enforcement of regulations that ensure appropriate uses of the trail.		
D. Ensure effective management of lands affecting the trail experience consistent with the PCTA’s vision.	3. Forest Service has an approved trail wide direction for the management and protection of the Pacific Crest Trail experience by 2 <sup>nd</sup> quarter 2008.	In progress – The new Forest Service PCT Program Manager actually worked on a draft set of PCT standards and guides in 1999 as an assistant to the Forest Service’s then PCT manager. This should help us as we move forward on this benchmark. Need to discuss with the new Forest Service PCT Program Manager.
	4. PCTA is able to respond to all proposed actions affecting the PCT experience by 4 <sup>th</sup> quarter 2010.	In progress – Currently we have the capacity in place to respond to all proposed actions on about 1700 miles of trail and can respond to most of the pressing issues on all 2650 miles.
	5. Engage Forest Service, Bureau of Land Management, National Park Service and California State Parks in a discussion of regulation enforcement by 4th quarter 2007.	Not started, dependent on the Forest Service PCT Program Manager who did not start until the end of July 2007. Need to discuss with the new Forest Service PCT Program Manager.



**Goal: II.** The Pacific Crest Trail is designed, constructed and maintained through cooperative management.

Strategies	Benchmarks	Status
A. Monitor the state of the trail and prioritize trail construction and maintenance.	1. Agreement with Forest Service, Bureau of Land Management, National Park Service and California State Parks on a trail assessment methodology for the Pacific Crest Trail by 4th quarter 2008.	In progress – we have talked with the USFS at the regional level about training PCTA staff members in the use of their trail assessment system. Dana & Mike attended INFRA (USFS infrastructure database) training in May. See July 2007 Trail Operations Report for more information.
B. Develop strong, effective partnerships with government agencies that have trail responsibilities.	2. Trail construction & maintenance are prioritized using a trail assessment methodology by 4 <sup>th</sup> quarter 2010. <b>Mike suggests that this benchmark be updated.</b>	Not started, dependent on Benchmark 1 above.
C. Ensure that the trail is designed, constructed and maintained to the Comprehensive Management Plan standard.	3. Annual meetings with Forest Service, Bureau of Land Management, National Park Service, California State Parks at the national, regional, state, unit (National Forest & National Parks) and local (district office) levels. <ul style="list-style-type: none"> <li>• Annual meeting at unit/local levels covering 50% of these offices by 4<sup>th</sup> quarter 2007.</li> <li>• Annual meeting at unit/local level covering 75% of these offices by 4<sup>th</sup> quarter 2009.</li> </ul>	In progress – met with FS, BLM, and NPS in Washington DC 2/2007 (national level).  Trail Operations staff have conducted a total of 53 agency meetings since January 1 at the unit & local level.  Need to count the number of total unit and local level offices in order to accurately measure progress towards this Benchmark.
D. Support volunteer involvement in all aspects of trail stewardship.	4. A system of training modules is in place in trail design, construction and maintenance by 4 <sup>th</sup> quarter 2009.	In progress – PCTA will hold its second advanced trail tools training course in November 2007. Eight chainsaw & crosscut certification trainings are scheduled in 2007. Backcountry first aid training also being offered in 2007. The second annual mid-Oregon spring training was held in 2007. All these courses will become training modules.



**Goal: II.** The Pacific Crest Trail is designed, constructed and maintained through cooperative management.

Strategies	Benchmarks	Status
	5. Using state of the art technology for trail and land management by 4 <sup>th</sup> quarter 2010.	In progress – The advanced trail tools training course is part of our plan and represents progress in utilizing state of the art technology for trail construction.
	6. Agreement with Forest Service, Bureau of Land Management, Park Service and California State Parks to maximize volunteer involvement in planning design, construction and maintenance on the Pacific Crest Trail by 4 <sup>th</sup> quarter 2008.	In progress - Still need further work with the other land management agencies.  Complete with the Forest Service – information is included in the new 5 year agreement between the PCTA and the FS.



Goal III. The Pacific Crest Trail is widely recognized as an internationally significant resource.		
Strategies	Benchmarks	Status
<p>A. Provide trail information and resources for trail users and the public.</p> <p>B. Educate decision-makers and stakeholders about trail issues.</p> <p>C. Increase public awareness and support for the trail.</p>	1. 50% of the park and forest retail outlets near the Pacific Crest Trail are carrying Pacific Crest Trail information by 4 <sup>th</sup> quarter 2008.	In progress but need mechanism for measuring. Progress – recruited volunteer interested in leading and expanding this project. Volunteer is Ruth Godding from Seattle, who chaired the Seattle Trail Fest in 2007.
	2. Web site traffic increases 25% by 4 <sup>th</sup> quarter 2007. <b>Revise benchmark to 2008.</b>	In progress – will measure results in 4 <sup>th</sup> quarter 2008. Need to establish 2007 baseline.
	3. Increase the current number of brochure “types” to 5 by 4 <sup>th</sup> quarter 2008.	In progress – <i>Volunteer recruitment brochure is in draft form and will be finished by March 2008.</i>
	4. Increase the brochures display locations by 20% by 4 <sup>th</sup> quarter 2008.	In progress but need mechanism for measuring. Need to establish a baseline of brochure display locations.
	5. Present Hike the Hill materials to Governors, State Legislators and County Representatives of California, Oregon, and Washington; Mayors of major cities along the PCT; regional and state level agency staff.	In progress – Hike the Hill materials are presented to elected officials on a meeting by meeting basis, and will continue to be presented as new opportunities arise.
	6. Identify 5 major trail projects and provide semi annual progress update in the <i>Communicator</i> and targeted mailing lists.	In progress. An article has been included with donor thank you letters and three trail protection updates have been published in the <i>Communicator</i> as of July 2007.
	<b>Revise and clarify benchmark</b>	



Goal III. The Pacific Crest Trail is widely recognized as an internationally significant resource.		
Strategies	Benchmarks	Status
	7. Identify 3 – 10 new public venues to educate public and trail users by 4 <sup>th</sup> quarter 2009.  <b>Revise and clarify benchmark</b>	In progress, the new Volunteer Coordinator will help coordinate.
	8. Identify 3-4 organizations/businesses and meet with senior leadership to consider formal affiliations by the 4 <sup>th</sup> quarter 2009.  <b>Revise and clarify benchmark</b>	Not started

**Goal IV.** The Pacific Crest Trail Association has the financial resources needed to accomplish its mission.

Strategies	Benchmarks	Status
<p>A. Develop and implement a comprehensive fundraising plan.</p> <p>B. Engage the Board of Directors in fundraising.</p> <p>C. Expand the size of the membership.</p> <p>D. Increase public awareness and support for the Pacific Crest Trail Association</p>	<p>1. An updated comprehensive fundraising plan is approved by Board of Directors annually.</p>	<p>In progress – The fundraising plan has been approved. The next step is to incorporate the fundraising plan strategies into this strategic plan and adjust benchmarks accordingly.</p>
	<p>2. The comprehensive fundraising plan includes planned giving.</p>	<p><i>Ongoing initiative</i> – Liz’s Communicator columns in 2007 have all featured alternative ways of giving and one column focused on how to include the PCTA through a bequest in a will.</p>
	<p>3. All Board members make a personal financial contribution per the Board of Directors’ job description.</p>	<p><i>Ongoing initiative</i> – Included in the fundraising committee’s 2007 work plan.</p>
	<p>4. Fundraising Committee meets at least 8 times a year with a least one face to face meeting.</p>	<p><i>Ongoing initiative</i> – <i>The fundraising committee will meet regularly in 2008 with the face to face meeting scheduled for July.</i></p>
	<p>5. Pacific Crest Trail Association has achieved membership levels as follows:</p> <ul style="list-style-type: none"> <li>• 8,000 members by 4<sup>th</sup> quarter 2007</li> <li>• 9,200 members by 4<sup>th</sup> quarter 2008</li> <li>• 10,500 members by 4<sup>th</sup> quarter 2009</li> </ul>	<p>In progress – 6,388 members at 4<sup>th</sup> quarter 2006. 2007 membership numbers not yet available.</p>



**Goal IV.** The Pacific Crest Trail Association has the financial resources needed to accomplish its mission.

Strategies	Benchmarks	Status
<p><i>Suggested benchmarks to add: Begin to establish a financial reserve in 2009 (get input from Finance committee)</i></p> <p><i>Could add benchmarks about Major Gifts program and Outdoor Industry fundraising (see Executive Director review goals)</i></p>	<p>6. Pacific Crest Trail Association has the following number of donors contributing more then \$1,000 in unrestricted support.</p> <ul style="list-style-type: none"> <li>• 80 by 4<sup>th</sup> quarter 2007</li> <li>• 100 by 4<sup>th</sup> quarter 2008</li> <li>• 125 by 4<sup>th</sup> quarter 2009</li> </ul>	<p>In progress – 69 \$1000 + donors at 4<sup>th</sup> quarter 2006. <i>2007 donor numbers not yet available.</i></p>
	<p>7. Board members make 3 contacts within their personal/professional network not affiliated with the PCTA and tell the PCTA story.</p>	<p>In progress – Fundraising committee will be working with PCTA board members to develop and practice their stories. Next step will be to identify contacts and tell their story.</p>
	<p>8. A Public Relations Plan is in place for the Pacific Crest Trail Association by 2<sup>nd</sup> quarter 2008.</p> <p><b>Revise benchmark – replace “Public Relations” with “Outreach”.</b></p>	<p>In progress – The 2008 budget includes plans to raise money to fund a planning process. In addition, Liz has been talking with prospective volunteers with outreach experience.</p>
	<p>9. Through Public Relations initiative, achieve placement of PCT/PCTA story in International influencing media.</p> <ul style="list-style-type: none"> <li>• 15 media releases by 4<sup>th</sup> quarter 2006</li> <li>• 25 media releases by 4<sup>th</sup> quarter 2007</li> <li>• 30 media releases by 4<sup>th</sup> quarter 2008</li> </ul> <p><b>Revise benchmark: Need to clarify what a media release is. PCTA is not doing press releases.</b></p>	<p>Not started. <i>This Benchmark will be clarified as part of the Outreach Plan.</i></p>

<b>Goal V. The Pacific Crest Trail Association has the human resources needed to accomplish its mission.</b>		
<b>Strategies</b>	<b>Benchmarks</b>	<b>Status</b>
<p>A. Develop an effective governing Board of Directors.</p> <p>B. Recruit, support and invest in volunteers.</p> <p>C. Recruit, support and invest in staff</p> <p><b>Might add benchmark about human resources items from the executive director's goals.</b></p> <p><b>Add benchmark about other volunteer organizations (related to Strategy B)</b></p>	1. The Board has more than 14 active members by 3 <sup>rd</sup> quarter 2007.	In progress – The Board Development Committee is actively recruiting new board and committee members. <i>There are currently 10 active members and two that have committed to joining us in 2008. We will unable to achieve this benchmark until 2009 because there are no more vacancies to fill.</i>
	2. More than 85% of the Board members contribute regularly to governance decisions and projects.	<i>Complete – A Board Self Evaluation survey was completed by all Board members at the July 2007 Board Meeting. 100% of the Board members responded that they feel they contribute regularly to governance decisions and projects.</i>
	3. More than 85% of Board members rate their involvement as “very satisfying.” <b>Revise benchmark: Unclear as to whether “very satisfying” refers to Board members’ own contribution to the Board, or the performance of the Board itself.</b>	<i>Complete – A Board Self Evaluation survey was completed by all Board members at the July 2007 Board Meeting. 42% of members rated their involvement as “very satisfying,” 29% rated it as “satisfying” and 29% rated it as “adequate.”</i>
	4. More than 85% of Board members describe their involvement as making a difference to the PCT.	<i>Complete – A Board Self Evaluation survey was completed by all Board members at the July 2007 Board Meeting. 86% of members responded that they feel their involvement is making a difference to the PCT.</i>
	5. Attendance at Board meetings is greater than 85%.	In progress – Will measure by tracking attendance.
	6. Reach 50,000 annual PCTA volunteer hours by 4 <sup>th</sup> quarter 2007.	Completed - We exceeded this goal at the end of 2006 with a total of 55,000 volunteer hours.
	7. Reach 60,000 volunteer hours by 4 <sup>th</sup> quarter 2009.	N/A
	8. More than 85% of Pacific Crest Trail Association volunteers rate their job “very satisfying” by 4 <sup>th</sup> quarter 2008.	In progress – Plan is to develop the survey and distribute at the December 2007 trail operations conference to collect feedback on the survey instrument. Distribute to volunteers in 2008.

**Goal V.** The Pacific Crest Trail Association has the human resources needed to accomplish its mission.

Strategies	Benchmarks	Status
	9. Volunteers are involved in four Pacific Crest Trail Association functional areas other than trail maintenance at a level of : <ul style="list-style-type: none"> <li>• 7,000 volunteer hours by 4<sup>th</sup> quarter of 2007</li> <li>• 8,000 volunteer hours by 4<sup>th</sup> quarter of 2009</li> </ul>	In progress – 6,332 annual hours in 2006 by volunteers in functional areas such as: Public Information & Admin, Communicator Publication, Advocacy and Governance. The new PCTA volunteer coordinator came on board July 25 <sup>th</sup> and will help reach this benchmark.
	10. More than 85% of staff rates their job as “very satisfying”.	In progress – PCTA Leadership Team is developing survey.
	11. Annual staff evaluations include professional development plans.	<i>Ongoing initiative</i> – Professional development plans are part of annual staff evaluations.
	12. Completed staffing plan is in place by 2 <sup>nd</sup> quarter 2007.	Complete – staffing plan is included with the July 2007 executive director report.
	13. Pacific Crest Trail Association personnel policies and procedures are documented and communicated by 4 <sup>th</sup> quarter 2007.	In progress – We have contracted with a Human Resources firm and they have completed their initial audit. They will be making recommendations. Change completion date to 1 <sup>st</sup> Qtr 2008.



Goal VI. The Pacific Crest Trail Association has the systems and infrastructure needed to accomplish its mission.

Strategies	Benchmarks	Status
A. Develop and maintain the necessary facilities.	1. Regional offices are publicly accessible within three years of creation.	In progress – First regional office opened in Cascade Locks, Oregon in June 2007. <i>Second regional office opened in Idyllwild, California in January 2008.</i>
B. Integrate the best technology into the organization’s operations.	2. Pacific Crest Trail Association trail crews will have access (use) to base camps and training.	In progress – Need to work with new USFS PCT manager to get USFS support of this project.
C. Design and implement the systems necessary to operate efficiently.	3. Identify strategic location for Pacific Crest Trail Association headquarters and national visitors’ center by 4 <sup>th</sup> quarter 2007.	Deferred
	4. Technology assessment recommendations are implemented within twelve months.	<i>In progress – Began implementation in December 2007. Four out of 12 are complete. Two are being implemented and remaining six will be implemented later in the year.</i>
	5. Clean audit every year with all audit recommendations implemented or addressed prior to the beginning of next audit cycle.	In progress – 2006 Audit was clean but still need a conflict of interest policy. Conflict of interest policy on July 2007 board agenda for approval. Not approved in July; need conflict of interest policy. <i>Policy is on January 2008 Board agenda for approval.</i>
	6. Document retrieval and retention “system” that fulfills the needs of our internal and external partners by 4 <sup>th</sup> quarter 2008.	In progress – recommendations included in technology assessment
	7. Strategic Plan is updated by 4 <sup>th</sup> quarter 2009.	N/A