



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

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## **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.

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### **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.

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### **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.



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2007-2009 Strategic Plan  
Progress Report

Updated 7/12/2009

**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 protection is in place by 4 <sup>th</sup> Quarter 2008.	In progress – The Land Protection Plan is in draft form. <i>The Land Protection Committee has been fine-tuning the document, and the Board is scheduled to approve it at the July 2009 meeting.</i>
B. Ensure proper design of the trail corridor.		
C. Support enforcement of regulations that ensure appropriate uses of the trail.	2. PCTA is positioned to take a lead role in PCT land protection projects by 4 <sup>th</sup> quarter 2007.	In progress – Land Protection Plan needed first (see benchmark 1 above). Pilot projects for all three states have been selected and the PCTA is taking a lead role on a project in Southern Oregon that will permanently protect a one mile section of the PCT.
D. Ensure effective management of lands affecting the trail experience consistent with the PCTA’s vision.	3. Forest Service needs an approved trail wide direction for the management and protection of the Pacific Crest Trail. Develop a strategy for accomplishing this by 4th Quarter 2009.	In progress – Beth, the USFS PCT Program Manager, is working on a plan to successfully develop direction and a venue for its adoption. This is a major priority for 2009. Mike will be a member of the team to develop the direction.
	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 2,000 miles of trail and can respond to most of the pressing issues on all 2,650 miles. After the North Cascades regional office is added in November of 2009, there will only be a gap of 350 miles trail-wide.
	5. Secure funding to implement the Land Protection program by 2nd Quarter 2009.	<i>Delayed – we are working to identify potential donors and foundations.</i>
	6. Develop criteria for prioritizing land protection projects from within the land acquisition inventory by 4th Quarter 2009.	<i>In progress – A subcommittee of the Land Protection Committee has begun to work on this.</i>



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

Strategies	Benchmarks	Status
<p>A. Monitor the state of the trail and prioritize trail construction and maintenance.</p> <p>B. Develop strong, effective partnerships with government agencies that have trail responsibilities.</p> <p>C. Ensure that the trail is designed, constructed and maintained to the Comprehensive Management Plan standard.</p> <p>D. Support volunteer involvement in all aspects of trail stewardship.</p>	<p>1. Trail construction &amp; maintenance are prioritized using a trail assessment methodology by 4<sup>th</sup> quarter 2010.</p>	<p><i>Deferred – Need to rethink benchmark for new strategic plan.</i></p>
	<p>2. Annual meetings with Forest Service, Bureau of Land Management, National Park Service, California State Parks at the national, regional, state, unit (National Forest &amp; National Parks) and local (district office) levels.</p> <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 2010.</li> </ul>	<p>In progress – met with FS, BLM, and NPS in Washington DC in February of 2009 (national level).</p> <p>Staff conducted a total of 235 agency meetings in 2007 and 354 meetings in 2008. <i>So far in 2009, PCTA staff has conducted 195 agency meetings.</i></p>
	<p>3. A system of training modules is in place in trail design, construction and maintenance by 4<sup>th</sup> quarter 2009.</p>	<p>In progress – Dana and Jen, working with the Mt. Hood Chapter and Trail Keepers of Oregon, successfully received a grant from REI to move this project forward in 2009. <i>Nine courses have been developed as part of PCTA’s Trail Skills College curriculum. These courses were taught at PCTA’s first Trail Skills College at the beginning of June.</i></p>
	<p>4. Using state of the art technology for trail and land management by 4<sup>th</sup> quarter 2010.</p>	<p>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. PCTA Staff participated in GIS/GPS Training in April of 2008 and folks are already starting to use the equipment in the field.</p>



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

Strategies	Benchmarks	Status
	5. 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 2009.	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. Our new Challenge Cost Share agreement is a good step towards reaching this goal with the BLM. <i>Some direction will be included in the new MOU when it is signed.</i>
	6. Meet or exceed the program targets in the Annual Operating Plan of the US Forest Service Challenge Cost Share Agreement as reported to the Forest Service on a quarterly basis.	We continue to meet this goal and exceed it in many respects. The quarterly and annual reports are well received by the Forest Service.



<b>Goal III.</b> The Pacific Crest Trail is widely recognized as an internationally significant resource.		
<b>Strategies</b>	<b>Benchmarks</b>	<b>Status</b>
<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>	<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.</p>	<p>In progress but need mechanism for measuring. We recruited a volunteer interested in leading and expanding this project. Volunteer is Ruth Godding from Seattle, who chaired the Seattle Trail Fest in 2007. We are working to document procedures for this program so we can provide more clear direction to the volunteers involved. Once procedures are documented we will work with the volunteer to finalize a list of the intended outlets and then develop a plan for stocking these outlets.</p>
	<p>2. Increase the brochures' non-agency display locations by 20% by 4th quarter 2008.</p>	<p>In progress but need mechanism for measuring. Need to establish a baseline of brochure display locations.</p>
	<p>3. Provide information to offices of all members of Congress in California, Oregon and Washington on an annual basis.</p>	<p>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.</p>



<b>Goal IV. The Pacific Crest Trail Association has the financial resources needed to accomplish its mission.</b>		
<b>Strategies</b>	<b>Benchmarks</b>	<b>Status</b>
<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>	1. An annual fundraising plan is adopted by the Board of Directors by the end of each calendar year.	Delayed - The Development Department and Fundraising Committee are developing a Fundraising Plan for 2010. The Fundraising Committee will present the plan at a future Board meeting.
	2. All Board members make a personal financial contribution per the Board of Directors' job description.	Ongoing initiative – <i>In 2009 to date, we have received donations from 7 Board members. Thank you!</i>
	3. Pacific Crest Trail Association has achieved membership levels as follows: <ul style="list-style-type: none"> <li>• 7,500 members by 4<sup>th</sup> quarter 2008</li> <li>• 8,500 members by 4<sup>th</sup> quarter 2009</li> </ul>	In progress - 6,388 members at 4th quarter 2006. 6,845 members at 4th quarter 2007. 7,810 members at 4th quarter 2008. <i>The current number of members as of May 31, 2009 is 7,761.</i>
	4. An Outreach Plan is in place for the Pacific Crest Trail Association by 3rd quarter 2008.	Deferred - The 2009 budget includes revenue and expenses needed to develop an outreach plan. We will need to secure grant funding before we can move forward with the plan.
	5. Fundraising goals listed in the annual plan are reviewed quarterly by the Fundraising Committee.	Not started - Will begin once the annual fundraising plan is completed and approved.
	6. All Board members receive a personal ask by a PCTA representative for their annual gift.	<i>In progress – A personal ask of each board member is part of the Major Gifts plan.</i>
	7. All Board members participate in the Fundraising cycle.	Need mechanism to measure progress.
	8. Develop a strategy to increase our membership retention rate by 3rd quarter 2009.	In Progress - A 5th Renewal Notice has been developed and will mail quarterly beginning in Jan. 2009. A renewal notice for deeply lapsed members (lapsed over 1 year) will be mailed quarterly beginning in January 2009.
	9. Secure funding for developing an Outreach Plan and Program by 3rd quarter 2009.	In progress – we are identifying foundations and developing contact strategies.

<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>	1. The Board has more than 14 active members by 3 <sup>rd</sup> quarter 2007.	In progress – In March 2008 the Board passed a resolution to increase the number of Board members to 16. <i>There are currently 12 active members.</i>
	2. More than 85% of the Board members contribute regularly to governance decisions and projects.	Ongoing initiative – <i>A Board Self Evaluation survey was completed by all Board members at the March 2009 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.”	Ongoing initiative – <i>A Board Self Evaluation survey was completed by all Board members at the March 2009 Board Meeting. 67% of members rated their involvement as “very satisfying,” and 33% rated it as “satisfying.”</i>
	4. More than 85% of Board members describe their involvement as making a difference to the PCT.	Ongoing initiative – <i>A Board Self Evaluation survey was completed by all Board members at the March 2009 Board Meeting. 100% 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%.	Ongoing initiative – 2008 Board meetings had an 88% attendance rate. <i>The 2009 Board meetings so far have had an 86% attendance rate.</i>
	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 75,000 volunteer hours by 4 <sup>th</sup> quarter 2009.	In progress. For 2008, the total volunteer hours were 66,946.
	8. More than 85% of Pacific Crest Trail Association volunteers rate their job “very satisfying” by 1 <sup>st</sup> quarter 2009.	<i>Deferred – This benchmark will be revisited in the next strategic planning process.</i>

**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 in the functional areas of Advocacy & Fundraising, Administration & Governance, Communications & Outreach, Trail Protection 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>• 7,500 volunteer hours by 4<sup>th</sup> quarter of 2009</li> </ul>	In progress – 6,332 hours in 2006, 5,064 hours in 2007 and 4,409 hours in 2008 by volunteers. PCTA Volunteer Coordinator has developed an individual volunteer form for tracking these hours, which will help to record them more accurately.
	10. Annual employee turnover ratio is less than 10%.	Ongoing initiative – The turnover ratio for permanent employees for 2008 was 7.7%.
	11. Annual staff evaluations include professional development plans.	Ongoing initiative – Professional development plans are complete and 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. The staffing plan is complete through 2009.
	13. Pacific Crest Trail Association personnel policies and procedures are documented and communicated by 1st quarter 2009.	In progress – <i>The Employee Guidebook is going through a second legal review. The next step will be for the Executive Committee to review the Guidebook, and present it to the full Board at the October 2009 meeting.</i>
	14. Staffing plan is reassessed and updated each year as part of the budget process.	The staffing plan for 2009 was completed as part of the budget process. The leadership team plans to meet to discuss a 3 to 5 year budget. The long-term staffing plan will be updated as part of this process.



Goal VI. The Pacific Crest Trail Association has the systems and infrastructure needed to accomplish its mission.		
Strategies	Benchmarks	Status
<p>A. Develop and maintain the necessary facilities.</p> <p>B. Integrate the best technology into the organization's operations.</p> <p>C. Design and implement the systems necessary to operate efficiently.</p>	1. Regional offices are publicly accessible within three years of hiring a Regional Representative.	In progress – First regional office opened in Cascade Locks, Oregon in June 2007. Second regional office opened in Idyllwild, California in January 2008. PCTA opened the new office for the Big Bend region in Medford in January of 2009. <i>When the new North Cascades Regional Office in Seattle, it will be co-located with the Washington Trails Association office.</i>
	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. Currently have good access to training, but need work on the base camps. The goal is to have one base camp for each regional office. <i>Ian and Dana have been working with forests in their regions with the hope of receiving ARRA funds to renovate existing camps.</i>
	3. Identify strategic location for Pacific Crest Trail Association headquarters and national visitors' center by 4 <sup>th</sup> quarter 2007.	Deferred. The headquarters will remain in Sacramento through 2014, and this initiative will be revisited in the future.
	4. Technology assessment recommendations are prioritized and implemented.	In progress – Began implementation in December 2007. Eight out of twelve recommendations are complete. The rest are in progress. A technology assessment component should be included during every Strategic Planning process.
	5. Clean audit every year with all audit recommendations implemented or addressed prior to the beginning of next audit cycle.	<i>The 2008 audit took place March 2-4. The auditor reported no findings or adjustments to management and to the finance committee. The finance committee will present the audit to the board for approval at the July board meeting.</i>
	6. Document retrieval and retention "system" that fulfills the needs of the PCTA by 4 <sup>th</sup> quarter 2008.	Delayed – recommendations included in technology assessment. We have begun establishing the framework for the new system and will begin implementation before the end of 2009.
	7. Strategic Plan is updated by 4 <sup>th</sup> quarter 2009.	In progress – <i>An ad-hoc strategic planning committee was appointed during the March board meeting, and has begun the process of updating the Plan.</i>