



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.

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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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Progress Report

Updated 10/26/2008

Goal I. The PCT corridor is permanently protected for hikers & equestrians.		
Strategies	Benchmarks	Status
<p>A. Provide leadership and collaborate in efforts to acquire land for the trail and its corridor.</p> <p>B. Ensure proper design of the trail corridor.</p> <p>C. Support enforcement of regulations that ensure appropriate uses of the trail.</p> <p>D. Ensure effective management of lands affecting the trail experience consistent with the PCTA's vision.</p>	1. A program plan for PCT land acquisition is in place by 2 nd Quarter 2007.	In progress – Deferred to 4th Quarter 2008. <i>The Land Protection Plan is in draft form. The committee will be reviewing the document in November and meeting in December to discuss it. The final Land Protection Committee meeting will be a face to face meeting sometime in January to finalize the Plan and the work of this committee.</i>
	2. PCTA is positioned to take a lead role in PCT land acquisition projects by 4 th quarter 2007.	In progress – Land Acquisition Program Plan needed first (see benchmark 1 above). The draft plan will include a section on pilot projects. The committee will develop criteria for pilot projects and recommendations for selecting pilot projects. 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.
	3. Forest Service has an approved trail wide direction for the management and protection of the Pacific Crest Trail experience by 2 nd 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. Mike and Beth are still working on strategy, and waiting to see how Continental Divide Trail's attempt plays out. Timing will be significantly delayed.
	4. PCTA is able to respond to all proposed actions affecting the PCT experience by 4 th quarter 2010.	In progress – Currently we have the capacity in place to respond to all proposed actions on about 1,700 miles of trail and can respond to most of the pressing issues on all 2,650 miles. <i>The new Northern Sierra Regional Representative means that we have capacity to cover and additional 400 miles of the PCT for these types of responses. Justin is already active in these issues.</i>
	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. This has become a lower priority. Mike recommends dropping this benchmark until a future planning round.

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. 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.</p>	<p>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.</p>
	<p>2. Trail construction & maintenance are prioritized using a trail assessment methodology by 4th quarter 2010. Mike suggests that this benchmark be updated.</p>	<p>Not started, dependent on Benchmark 1 above.</p>
	<p>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.</p> <ul style="list-style-type: none"> • Annual meeting at unit/local levels covering 50% of these offices by 4th quarter 2007. • Annual meeting at unit/local level covering 75% of these offices by 4th quarter 2009. 	<p>In progress – met with FS, BLM, and NPS in Washington DC 2/2008 (national level).</p> <p>Trail Operations staff conducted a total of 235 agency meetings in 2007.</p> <p>Need to count the number of total unit and local level offices in order to accurately measure progress towards this Benchmark.</p>
	<p>4. A system of training modules is in place in trail design, construction and maintenance by 4th 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 2008.</p>



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 th 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. PCTA Staff participated in GIS/GPS Training in April of 2008 and folks are already starting to use the equipment in the field.
	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 th 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. <i>Our new Challenge Cost Share agreement is a good step towards reaching this goal with the BLM.</i>

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 th quarter 2008.	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.
	2. Web site traffic increases 25% by 4 th quarter 2008. <i>Benchmark revised 3/30/2008.</i>	In progress – will measure results in 4 th quarter 2008. Need to establish 2007 baseline. 2007 statistics are unavailable. 2008 statistics are being tracked. <i>Installed new site analysis software in late August to obtain more accurate statistics.</i>
	3. Increase the current number of brochure “types” to 5 by 4 th quarter 2008.	In progress – the PCTA currently has 3 types of brochures. In order to determine our needs for additional types of brochures, the PCTA needs to develop an overall outreach plan and determine more specific brochure needs through this process.
	4. Increase the brochures display locations by 20% by 4 th 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. Revise Benchmark: Language suggests that every person listed should be visited, which is not feasible.	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. Revise and clarify benchmark	Regular trail project articles are included in each issue of the <i>Communicator</i> magazine.



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 th quarter 2009. Revise and clarify benchmark	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 th quarter 2009. Revise and clarify benchmark	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 - <i>The Development Department and Fundraising Committee are currently developing a Fundraising Plan for 2009. The Fundraising Committee will present the plan to the Board at the January 2009 meeting.</i></p>
	<p>2. The comprehensive fundraising plan includes planned giving.</p>	<p>Ongoing initiative – <i>The bequest policy has been revised. The development plan for 2009 will include a planned giving component.</i></p>
	<p>3. All Board members make a personal financial contribution per the Board of Directors’ job description.</p>	<p>Ongoing initiative – Included in the fundraising committee’s 2007 work plan. For 2008, PCTA staff will work with the Fundraising Committee on a personal solicitation plan for Board members.</p>
	<p>4. Fundraising Committee meets at least 8 times a year with a least one face to face meeting.</p>	<p>Ongoing initiative – <i>The Fundraising Committee met two times via teleconference during the 3rd Quarter of 2008. The Committee also met in person on July 12 at Manning Park, B.C.</i></p>
	<p>5. Pacific Crest Trail Association has achieved membership levels as follows:</p> <ul style="list-style-type: none"> • 8,000 members by 4th quarter 2007 • 9,200 members by 4th quarter 2008 • 10,500 members by 4th quarter 2009 	<p>In progress – 6,388 members at 4th quarter 2006. 6,845 members at 4th quarter 2007. 7,278 members at 3rd Quarter 2008. <i>We expect to end the year with 7,500 members. Due to a reduced level of new member acquisition activity in 2006, we started 2007 and ended 2007 with fewer members than projected.</i></p>

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

Strategies	Benchmarks	Status
<p>Could add benchmarks about Major Gifts program and Outdoor Industry fundraising (see Executive Director review goals)</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"> • 80 by 4th quarter 2007 • 100 by 4th quarter 2008 • 125 by 4th quarter 2009 	<p>In progress – 99 \$1,000+ donors at 4th quarter 2007. 66 \$1,000 + donors in October, 2008. <i>The Trail Guardian letter is being mailed by October 17. Also, we have raised over \$182,000 in major gifts for the First Mile campaign. Also secured \$100,000 for land protection start-up costs in 2009.</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><i>In progress - Identifying connections will be a key part of the major gifts plan (which will be part of the 2009 development plan).</i></p>
	<p>8. An <i>Outreach</i> Plan is in place for the Pacific Crest Trail Association by 2nd quarter 2008. <i>Benchmark revised 3/30/2008.</i></p>	<p><i>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.</i></p>
	<p>9. Through Public Relations initiative, achieve placement of PCT/PCTA story in International influencing media.</p> <ul style="list-style-type: none"> • 15 media releases by 4th quarter 2006 • 25 media releases by 4th quarter 2007 • 30 media releases by 4th quarter 2008 <p>Revise benchmark: Need to clarify what a media release is. PCTA is not doing press releases.</p>	<p>Not started. This Benchmark will be clarified as part of the Outreach Plan.</p>



Goal V. The Pacific Crest Trail Association has the human resources needed to accomplish its mission.		
Strategies	Benchmarks	Status
A. Develop an effective governing Board of Directors. B. Recruit, support and invest in volunteers. C. Recruit, support and invest in staff Might add benchmark about human resources items from the executive director's goals.	1. The Board has more than 14 active members by 3 rd quarter 2007.	In progress – In March 2008 the Board passed a resolution to increase the number of Board members to 16. <i>The Board currently has 12 active members. The Board Development Committee has identified 3 prospective new members to put on the ballot in 2009, which would bring the total number of board members to 13 (after two current members term out).</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 July 2008 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 July 2008 Board Meeting. 70% of members rated their involvement as “very satisfying,” and 30% 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 July 2008 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 – <i>The attendance at Board meetings will be tracked and evaluated on an annual basis. 2007 Board meetings had an 89% attendance rate. The first three Board meetings of 2008 had a 90% attendance rate.</i>
	6. Reach 50,000 annual PCTA volunteer hours by 4 th quarter 2007.	Completed - <i>We exceeded this goal at the end of 2006 with a total of 55,000 volunteer hours. Mike will suggest a new goal for 2009.</i>
	7. Reach 60,000 volunteer hours by 4 th quarter 2009. Change to 75,000 hours.	Completed - <i>We exceeded this goal at the end of 2007 with a total of 64,500 volunteer hours. Mike will suggest a new goal for 2009. For 2008 we are currently at 40,064 hours.</i>
	8. More than 85% of Pacific Crest Trail Association volunteers rate their job “very satisfying” by 1 st quarter 2009.	In progress – <i>PCTA Volunteer Coordinator is developing a survey, and getting feedback from a sampling of volunteers.</i>

Benchmark revised 3/30/08.

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"> • 7,000 volunteer hours by 4th quarter of 2007 • 8,000 volunteer hours by 4th quarter of 2009 	In progress – 6,332 hours in 2006 and 5,064 hours in 2007 by volunteers recorded in functional areas such as: Public Information & Admin, Communicator Publication, Advocacy and Governance. PCTA Volunteer Coordinator has developed an individual volunteer form for tracking these hours, which will help to record these hours more accurately. New individual volunteer form is available on PCTA website in "Volunteer Resources." Need to revise categories.
	10. More than 85% of staff rates their job as “very satisfying”.	The leadership team is discussing revising this benchmark. We plan to change this to a more objective measurement such as turnover ratio.
	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 nd 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 1 st quarter 2008. Benchmark revised 3/30/2008.	In progress – We have contracted with a Human Resources firm and they have completed their initial audit. They are in the process of developing an employee handbook. <i>The leadership team has completed a full review of the handbook. The team has made significant rewrites which has been submitted to our HR consultant for her review and a lawyer's review. Next steps will include staff review, board review, and board approval.</i>



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> <p>Investigating a crew camp in the Big Bend region with the US Forest Service.</p>	1. Regional offices are publicly accessible within three years of <i>hiring a Regional Representative. Benchmark revised 3/30/08.</i>	In progress – First regional office opened in Cascade Locks, Oregon in June 2007. Second regional office opened in Idyllwild, California in January 2008. <i>Discussions are underway with WTA to co-locate the new North Cascades Regional Office in Seattle.</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.
	3. Identify strategic location for Pacific Crest Trail Association headquarters and national visitors' center by 4 th quarter 2007.	Deferred. The headquarters will remain in Sacramento through 2009, and this initiative will be revisited during the next Strategic Planning process.
	4. Technology assessment recommendations are implemented within twelve months.	In progress – Began implementation in December 2007. Four out of 12 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.	In progress - The 2007 audit was clean with one exception of a grant compliance finding (2007 was the first year that PCTA's audit contained a grant compliance component). Contracts awarded under the grant did not contain specified Davis-Bacon or Service Contract Act Clause. Teresa and Mike are working with Beth Boyst to resolve this finding in future years.
	6. Document retrieval and retention "system" that fulfills the needs of our internal and external partners by 4 th quarter 2008.	In progress – recommendations included in technology assessment. We have begun establishing the framework for the new system and will begin implementation in <i>4th Quarter 2008.</i>
	7. Strategic Plan is updated by 4 th quarter 2009.	In progress – Board is discussing options for updating. More information will be provided at the January board meeting.