

APPENDIX 1 - AUTHORIZING AND REFERENCE DOCUMENTS

The authority for trail marking projects, and some policies and procedures are described in several OCTA/NWOCTA and *Hugo* documents. Wording in brackets [] added by the MMC March 2012 for clarity. Relevant portions of these documents are (see the originals for completeness):

Oregon-California Trails Association Trail Marker and Trail Marking Policies

Section 2. NATIONAL AND CHAPTER RELATIONSHIPS

Chapters are chartered by the national organization and may not enter agreements on behalf of the Association or the chapter without specific authorization.

Individual chapters authorize and schedule trail-marking events, while members and guests provide the necessary workforce for trail marking.

Section 4. CHAPTER RESPONSIBILITIES

Individual chapters are encouraged to appoint a person to oversee trail-marking activities. At the chapter's option, the chapter preservation officer or a "trail marking coordinator" may be appointed. The appointee should be responsible to the chapter president. The chapter board or executive committee should approve all trail marking plans, thereby making it an official chapter event. The complete approval process is described in Section 7.

Sponsorship by the chapter results in insurance coverage for all participants under the national organization's policy. The personal waiver (Form 1) must be signed by all participants. The completed form will be kept in chapter files.

Section 7. AUTHORIZATION FOR PLACING TRAIL MARKERS

Section 7A. Initial Planning and Approval. The first step in the trail marking process is to obtain chapter approval for the project. At this point, a general description of the segment to be marked, the proposed marking approach (type of marker) and required resources (financial and other) should be prepared and submitted to the chapter for approval. Project leaders who are responsible to the chapter for required documentation should also be identified at this time.

Section 7B. Landowner Permission. Upon chapter approval of the project, the owners of properties on which markers are to be placed must be determined and written permission for placement of the marker must be obtained. Depending on the situation, "Form 2 - Landowner/Manager Permission and Release" or "Form 3 - Easement for Trail Marking" should be used.

1. Permission without an easement: In most cases the landowner will probably not wish to grant an easement. In this case a simple agreement granting permission to erect, maintain and remove the marker is appropriate. The following procedures should be followed:

a) Private landowner/manager. Form 2, Landowner/Manager Permission, is to be completed. One copy is to be given to the landowner and the other is to be retained in chapter files. Carsonite markers may be placed with a verbal agreement. The verbal agreement should be documented by the trail marking project leader via a memorandum for the record that is placed in the chapter file.

b) Public agencies. The BLM, Forest Service, NPS, State Parks, Fish and Wildlife and other public agencies should be contacted to obtain appropriate permits and permissions. The procedures are dependent upon the agency and in some cases the particular field office involved. A record of who granted permission should be made part of the chapter files.

The project leader is authorized to sign permits on behalf of OCTA once the project has been reviewed and approved by the chapter as described in Section 7A.

2) Easement to be Granted. [Extremely unlikely, see entire policy if needed]

Section 7C. Other Permits and Coordination. Coordination with governmental authorities at the city, county, state and federal levels must be completed before signs are installed.

Approval shall be obtained from federal, state or county transportation departments for trail markers to be placed near roadways.

Section 7D. Final Chapter Approval. Upon obtaining appropriate permits and permissions, the proposed trail marking should be presented to the chapter for final approval. The minimum information provided shall include:

1) The proposed location of each marker (other than Carsonite posts) on a 7.5 minute USGS map or equivalent. The location of Carsonite markers may be approximated, if possible.

4) Text to be included on markers.

A. Carsonite posts. Approved decals should be used with appropriate permission from the source.

5) Copies of all required permits and permissions.

The chapter shall maintain of file on each trail marking effort to include copies of all required permits and permissions.

Section 8. RECORDING MARKER LOCATIONS:

Form 5 provides a tabular listing that is more appropriate where a large number of markers are placed such as the Carsonite posts. Form 4 can be used to supplement Form 5 when it is appropriate to record more information.

A photograph may be attached to Form 4. If feasible, the location of the nearest posts to the subject one should also be noted on Form 4.

Upon completion of fieldwork, marker locations should be plotted on a 7.5 minute USGS maps or the computer-based equivalent. The completed package should be sent to the chair of the National Trail Marking Committee. Chapters may consider several trail marking activities along the same trail section as one and submit forms and maps as one package.

Section 9. AUTHENTICATION

The chapter person responsible for trail marking should authenticate the trail and placement of markers following the guidelines in the Mapping Emigrant Trails (MET) Guide.

Section 10. SUMMARY

Form 1	Required	Personal waiver	[Form TM1 is identical]
Form 2	Desired	Owner release	* see below
Form 3	Optional	Owner easement	[rarely used]
Form 4	Optional	Single marker	[Form TM3 is identical]
Form 5	Required	Multiple marker	[Use Form TM2 instead]
Form 6	Optional	Authentication	[Certification of trail remnant location, not required for Carsonite markers]

The following forms are required for the purchase of markers and labels (TM0), and for reimbursement (TM4):

none	[Required]	Request for Trail Markers	[Use Form TM0]
none	[Required]	Volunteer Contributions	[Use Form TM4]

* [OCTA Form 2 would generally be mailed to landowners along with an explanatory letter requesting permission to mark and/or map. Some landowners may not want to give written permission. Verbal permission is acceptable for Carsonite markers, in which case, make note of who gave the verbal permission along with your name and the date.]

Mapping Emigrant Trails (MET) Manual – Office of National Trails Preservation, Oregon-California Trails Association, Independence, MO. Fourth Edition (Revised & Expanded), July 2002.

Northwest Chapter of Oregon-California Trail Association - Duties of Trail Mapping and Marking Leaders

The trail mapping or marking leader obtains Executive Committee/Board authorization for all trail mapping and trail marking plans for the coming year.

For any proposed mid-year trail marking activities not identified in the chapter's initial budget or calendar, the leader obtains Executive Committee/Board approval to proceed.

The leader performs the following duties related to the mapping or marking activity.

Contacts public or private landowners for permission to map or mark.

Arranges for GPS systems, Carsonite markers, and installation equipment.

Recruits chapter members for participation in trail marking through e-mail reminders, the chapter newsletter, and meeting announcements.

Hugo Neighborhood Association and Historical Society documents:

Mapping Action Plan for Applegate Trail. Officers, Hugo Neighborhood Association & Historical Society & Hugo Emigrant Trails Committee. May 2005. Hugo, OR

Hugo Emigrant Trails Committee. Brochure 2, Emigrant Trails Series. March 24, 2005. Hugo, OR

“The *Trails Committee* was formed by the *Hugo Neighborhood* January 27, 2005.” “The *Trails Committee* has authority to determine its own members, officers, and projects.”

Hugo Emigrant Trail Inventory Process. Hugo Neighborhood Association & Historical Society, Public Outreach & Educational Brochure Committee for Hugo’s Emigrant Trails. July 27, 2005 - updated March 5, 2010. Brochure 4, Emigrant Trail Series. Hugo, OR

“The *Hugo Emigrant Wagon Trail Inventory (HEWTI)* will be conducted by the *Trails Committee* using OCTA’s mapping methods, including the plotting trail classification categories.”

“Mapping emigrant trails (MET) is OCTA’s program for locating, verifying, classifying and plotting emigrant trails based on standard systematic research methods and procedures. For example, the *Trails Committee* will use the four cardinal rules to verify a trail’s location on USGS 7.5 minute topographic quadrangles.”

“Most trail segments that remain visible today have been impacted by man and nature during the post-emigrant period. The *Trails Committee* will use OCTA’s trail classification scheme.”