



## Strategic Plan 2023

A strategic planning initiative was launched in late 2022 to guide investment decision-making and resource prioritization over an upcoming multi-year horizon. The organization's Board, Committee leads, regions, partners and stakeholder groups were engaged during this process to share perspectives, set expectations, and affirm direction for the future.

The planning process included individual and small-group interviews to collect information and synthesize feedback, building towards April and June 2023 workshops with the full Board where priorities for action and investment were determined.

It is the intent of the Board that the plan articulates a clear and comprehensive roadmap towards achieving the Foundation's priority objectives, acknowledging that the plan must flex and be amended as needed to adapt to changing circumstances. The plan should include measurable goals against which progress can be tracked.

The Board is willing to explore challenging subjects that spark debate and critical discussion. Relative to this Mission and Vision, the Board recognizes that "diverse heritage" and "sharing of its stories" encompasses sensitive subjects and the historical context in which the Expedition occurred. Engaging with topics such as the treatment of women, mental health, slavery, and relationships with Native Americans are recognized as important and relevant to the organization's present-day educational and outreach initiatives.

Five themes emerge upon which actions and priorities should be considered. These five themes encompass our goals for the organization to (a) strengthen financial resilience, (b) ensure that the L&C story is presented accurately and effectively across today's audience demographics, (c) act to preserve and protect the trail physically, (d) deliver education and outreach effectively to a variety of audiences, and (e) ensure that our governance of the organization is robust. In more detail:

- Financial Resilience is the need for reliable, sustainable, and unrestricted revenues to enable growth in capacity.

**Goal:** Increase the financial independence of LCTHF through targeted donor relations and active membership engagement. The organization seeks steady, reliable revenues from multiple sources (endowment, donors, grants, memberships, sponsorships, advertising) to fund its ambitious initiatives in support of its Mission and Vision.

**Profile:** - We have over 1,000 dedicated members within LCTHF - We have been able to secure sizeable grants in the past - We have a significant endowment that funds various program areas in the organization - The endowment draw does not sufficiently fund all program initiatives, requiring us to fill in the gaps with potential sources that are not promised or secured (guesses and hopes in donations/memberships) - Federal funding for projects is expected to be very minimal in future years - Our Foundation budget is manageable and reasonable, but very limited relative to funding staff activities and programs that are deemed crucial for long-term success/impact.

- Telling the Story emphasizes the need to connect with specific demographic targets (families, GenZ and Millennial households, tribes, history buffs, and our general membership) via appropriate and effective communications media (print, video, social media, web, and email).

**Goal:** Establish recognition for LCTHF as a premier organization that clearly promotes the Lewis and Clark National Historic Trail (LCNHT) as both historical and recreational.

**Profile:** - LCTHF has a large following regarding the historical aspect of the LCNHT - Taking responsibility for the NPS website (lewisandclark.travel) reaches a new audience and adds a new purpose in recreation/tourism. Recognize that additional staff time and new resources will be required to support this site - Other historical trail organizations share similar concerns (e.g., grow membership, ensure historical fidelity, connect with modern audiences), but are successfully navigating these challenges (think OCTA as an example) - Technology evolution requires that we must change, too, regarding outreach and impact (e.g., TikTok, Twitter, YouTube, whatever the new craze is) - The Lewis and Clark story has aspects that are not politically correct by modern societal norms. We need to be ready to have direct conversations surrounding these aspects of the story without being defensive. LCTHF must be prepared for inclusive conversations that will be uncomfortable - Additional dedicated staff resources will be expected to reach this Goal - Concept FYI: Proposed tagline to leverage... "Find your path to the Trail"

- Preserving the Trail Tread requires partnership with the National Park Service, US Forest Service, BLM, Tribes, state lands, and private landowners. This theme connects LCTHF interests with advocacy initiatives of the Partnership for National Trails (PNTS), state trail associations, and the American Indian Alaska Native Tourism Association (AIANTA).

**Goal:** Ensure the LCNHT is preserved through stewardship, recreational use, and interagency partnerships.

**Profile:** - The physical trail is under continual threat from development, access, deterioration, and vandalism - LCTHF has a committee to help monitor trail threats - LCTHF has been involved with federal planning and negotiations in the past for projects within the Trail Corridor - Taking responsibility for the lewisandclark.travel website creates more opportunities for LCTHF to promote recreation and tourism, but also entails responsibilities (to ensure accuracy, to promote tourism that aligns with community and tribal objectives) - We do not accept land donations, or have anything to do with land acquisition, which aligns with the policies of many other Trail organizations as they seek to preserve their trail tread.

- Education and Outreach reflects the organization's mission to support educators, scholars, interpretive centers, and the general membership and public with curricula, news, financial support, and opportunities to connect.

**Goal:** Become the premier resource for all education around Lewis and Clark, whether for schools, tour groups, or historians.

**Profile:** - We have a completed Curriculum Guide - The NPS has sources already that we can further develop with them - Lewis-clark.org and lewisandclark.travel are fantastic sources that we already have, and can continue to develop into better resources as more information becomes available - The Library and Archives is a great resource for researchers and historians, but awareness of our resource is low; we're not as referenced/sought after as we believe we should be - Increasing visibility/prominence of LCTHF will increase opportunities for recruitment of new members, additional outreach contacts, etc. - There is a gap in connectivity and connections across interpretative sites/facilities along the trail about what each location is doing/underway. LCTHF has an opportunity to "fill the gap" with prominence/leadership in cross-agency connections and among sites

- Governance including board and staff development for skills-building and capacity expansion, and support for regional/chapter development. Critically, governance also encompasses the relationship and accountability of staff vis a vis volunteers, and autonomy of staff vis a vis Board oversight.

**Goal:** The LCTHF Board of Directors is a diverse group with intent to grow the organization nationally and regionally through engagement and planning.

**Profile:** - We have a strong board of historians and professionals - LCTHF's 50+ year legacy is admirable in its many accomplishments - Most board members are involved with at least one committee - Bylaws are examined annually and updated as needed - All but one Region meets regularly - Policies and Procedures still need be compiled and updated - Succession plans for key roles (both staff and volunteers) need be developed - Gaps in board competencies (e.g., fund development) need be filled