

Public Engagement Workgroup Report

Lewis & Clark Trail Alliance Future State Strategy

Executive Summary

The Public Engagement Workgroup examined the challenges and opportunities facing the Lewis & Clark Trail Alliance as it seeks to build a larger, more engaged, and more sustainable community around the Lewis and Clark National Historic Trail. The workgroup identified a central challenge: while public interest in Lewis and Clark history, heritage tourism, outdoor recreation, and place-based storytelling remains strong, the Alliance has struggled to consistently convert awareness into meaningful participation, membership, advocacy, and financial support.

The Future State vision positions the Lewis & Clark Trail Alliance as the national connector, convener, and storyteller for the Trail. Success will require expanding visibility, strengthening discovery, reducing barriers to engagement, and investing in organizational capacity that supports growth at both the national and regional levels.

Current Challenges

Organizational Challenges

The Alliance faces several internal challenges that limit its ability to grow and engage new audiences:

- Long-term membership decline.
- An aging membership base.
- Limited staff and volunteer capacity.
- Uneven support for regional and chapter activities.
- Insufficient infrastructure to scale engagement efforts.

While volunteers remain essential to the organization, future growth cannot rely solely on volunteer labor. Increased engagement, audience growth, and membership development require dedicated staff resources, stronger systems, and improved coordination across the Trail corridor.

Public Engagement Challenges

The workgroup identified three primary public-facing challenges:

Visibility Many potential supporters, travelers, educators, and history enthusiasts remain unaware of the Alliance and its role in supporting the Trail.

Discoverability People interested in Lewis and Clark, heritage tourism, public lands, history, and outdoor recreation often encounter Trail-related content without ever discovering the Alliance.

Sustained Engagement The Alliance successfully generates interest through digital content and programs, but often lacks clear pathways that convert casual interest into ongoing participation, membership, donations, volunteerism, or advocacy.

The fundamental question is:

How do we convert interest into participation?

Strategic Priorities

To address these challenges, the Public Engagement Workgroup recommends five strategic priorities.

1. Strengthen Discovery

The Alliance must become easier to find and easier to understand.

Discovery should occur wherever potential audiences are already searching for information, including search engines, social media platforms, travel planning resources, heritage tourism channels, educational networks, and partner organizations.

The organization should focus on:

- Expanding digital reach and search visibility.
- Building partnerships that introduce new audiences to the Trail.
- Leveraging tourism and recreation as gateways to historical engagement.
- Positioning the Alliance as the authoritative source for Trail-wide information and experiences.

2. Lead with Story and Experience

The most effective way to engage new audiences is through compelling stories and meaningful experiences.

Rather than leading with organizational messaging, the Alliance should lead with:

- Travel experiences.
- Heritage tourism opportunities.
- Outdoor recreation.
- Personal stories.
- Historical interpretation.
- Contemporary relevance of the Lewis and Clark story.

By emphasizing experiences first, the organization can attract broader audiences and then guide them toward deeper engagement with the Trail and the Alliance.

3. Reduce Barriers to Engagement

Many people interested in Lewis and Clark history are not ready to become members immediately.

The Alliance should create multiple engagement pathways that allow people to participate before making a membership commitment.

Examples include:

- Email subscriptions.
- Substack subscriptions.
- Digital resource access.
- Event participation.
- Social media engagement.
- Citizen storytelling opportunities.
- Volunteer experiences.
- Heritage tourism programs.

Membership should become one of many engagement options rather than the sole entry point into the organization.

4. Expand Audience Pathways

Future growth depends on reaching audiences beyond traditional membership demographics.

Priority audiences include:

- Cultural and heritage travelers.
- Outdoor recreation enthusiasts.
- National Park visitors.
- Educators and students.
- Local communities along the Trail.
- History enthusiasts.
- Content consumers interested in American exploration, conservation, Indigenous perspectives, and western history.

The Alliance should intentionally create pathways that move individuals from awareness to engagement, and ultimately toward membership, advocacy, and philanthropy.

5. Invest in Activation

The workgroup concluded that meaningful growth requires active engagement throughout the Trail corridor.

A Regional Activation model should be developed to:

- Strengthen regional participation.
- Support chapters and local partners.
- Build relationships with communities along the Trail.
- Facilitate events and programs.
- Increase organizational visibility at the local level.

This investment recognizes that engagement is strongest when supported by both national leadership and local presence.

Organizational Capacity and Infrastructure

The workgroup strongly believes that organizational capacity is a prerequisite for future growth.

Key investments should include:

- Enhanced technology infrastructure.
- Modern constituent relationship management systems.
- Improved audience analytics.
- Content production capabilities.
- Dedicated staff support for engagement and activation.
- Tools and resources that empower chapters, partners, and volunteers.

Without these investments, audience growth and engagement efforts will remain difficult to sustain.

Positioning the Lewis & Clark Trail Alliance

The workgroup recommends positioning the Alliance as:

The National Connector and Convener

The Alliance occupies a unique position within the Lewis and Clark community. It can serve as the organization that connects travelers, communities, educators, historians, partners, public agencies, and supporters across the entire Trail.

This role extends beyond membership services and emphasizes:

- National leadership.
- Trail-wide collaboration.

- Information sharing.
- Community building.
- Advocacy and stewardship.

Focused Growth Along the Trail

Future expansion should prioritize communities, destinations, organizations, and audiences located along the Lewis and Clark National Historic Trail corridor.

This strategy creates opportunities for:

- Stronger local partnerships.
- Increased destination awareness.
- Regional program development.
- Community engagement.
- Heritage tourism growth.

Expand Through Strategic Partnerships

Partnerships will be essential to achieving scale.

Priority partnership categories include:

- National Park Service sites.
- Tourism organizations.
- State tourism agencies.
- Museums and cultural institutions.
- Tribal organizations.
- Educational institutions.
- Outdoor recreation organizations.
- Historical societies and preservation groups.

Strategic partnerships can significantly increase audience reach while reducing the cost of engagement and promotion.

Content as a Strategic Asset

The workgroup identified content as one of the Alliance's most valuable assets and greatest opportunities for growth.

The Alliance is uniquely positioned to become the leading publisher of Lewis and Clark Trail content.

Content should no longer be viewed solely as a communications function but as a strategic organizational asset that drives discovery, engagement, membership, partnerships, and revenue.

Core Content Platforms

We Proceeded On

The workgroup recommends evolving *We Proceeded On* from a member-focused magazine into a nationally recognized publication serving a broader audience interested in Lewis and Clark history, exploration, culture, and the Trail experience.

Discover Lewis and Clark

This platform should function as the primary public-facing discovery portal, helping travelers and prospective audiences explore destinations, stories, and experiences along the Trail.

Lewis & Clark Trail Experience

The Lewis & Clark Trail Experience should continue to grow as the Alliance's premier experiential engagement platform, connecting users directly to places, stories, and travel opportunities throughout the Trail corridor.

Substack

Substack provides a low-barrier entry point for audience growth and ongoing engagement. It offers opportunities to build relationships with readers who may eventually become members, donors, travelers, or advocates.

Trail News and Outreach

Regular publication of Trail-related news and stories can strengthen awareness, reinforce relevance, and maintain engagement between major organizational touchpoints.

Sherman Digital Library

The Sherman Digital Library represents a distinctive membership benefit and educational resource. Continued expansion and promotion can enhance its value to researchers, educators, members, and history enthusiasts while supporting the Alliance's role as a trusted source of Lewis and Clark information.

Conclusion

The Public Engagement Workgroup envisions a future in which the Lewis & Clark Trail Alliance serves as the national hub for discovery, engagement, and connection across the Lewis and Clark National Historic Trail.

Achieving this future will require a shift from a membership-centered engagement model toward an audience-centered engagement model that uses storytelling, experiences, partnerships, and content to build lasting relationships.

By strengthening discovery, reducing barriers to participation, investing in regional activation, and treating content as a strategic asset, the Alliance can expand its reach,

engage new generations of supporters, and build a stronger foundation for long-term organizational sustainability.

LEWIS AND CLARK TRAIL ALLIANCE

Programming Workgroup Report

June 21, 2026

I. EXECUTIVE SUMMARY

The Lewis and Clark Trail Alliance faces a critical inflection point defined by a steady decline in membership and a rapidly aging member base. Since peaking during the Lewis and Clark Bicentennial, membership has declined significantly, while nearly 80 percent of current members are now over the age of 65. This trend presents an urgent organizational challenge and a clear call to action: to ensure long-term sustainability, the Alliance must intentionally attract new—and especially younger—members.

At the heart of this opportunity is a strategic shift toward outward-facing, locally driven programming designed not only to serve existing members, but also to actively recruit new audiences. Every Alliance activity should be viewed as both a member benefit and a membership recruitment opportunity.

The Programming Workgroup recommends a coordinated strategy centered on five priorities:

1. Strengthening Local Programming and Organizational Support

Survey data and member feedback consistently demonstrate that locally based, experiential programming offers the strongest opportunity for engagement and growth. Regions and chapters are best positioned to build meaningful relationships within their communities through events, stewardship projects, speaker series, educational initiatives, and social gatherings.

Because the Alliance relies heavily on volunteers, however, many local leaders are already operating at capacity. To support sustainable implementation, the Future State Workgroups recommend strengthening organizational infrastructure through the creation of a dedicated staff position focused on chapter and regional support, programming coordination, partnership development, membership recruitment, and grant assistance.

2. Attracting Younger Members Through Experiential Engagement

To remain vibrant and relevant, the Alliance must intentionally design programs that appeal to younger audiences. Social, experiential, community-centered events—including

guided hikes, cleanup projects, trivia nights, restaurant partnerships, and digital programming—create accessible entry points for participation and help position the Alliance as an active and welcoming organization.

3. Engaging Educators to Inspire Future Generations

One of the Alliance’s greatest opportunities lies in education. Teachers, schools, universities, libraries, and students represent a natural bridge to younger generations and future members.

The Workgroup recommends expanding initiatives such as:

- The Lewis and Clark Virtual Reality Experience
- The Corps of Discovery Curriculum Guide
- “Teachers on the River” place-based learning programs
- Partnerships with libraries and educational organizations
- Potential student leadership simulations and digital learning experiences

These efforts position educators as ambassadors who inspire curiosity, stewardship, leadership, and lifelong engagement with the Lewis and Clark story.

4. Expanding Digital Outreach and Member Engagement

The Alliance’s websites, electronic publications, and digital platforms are experiencing substantial audience growth and present significant opportunities for membership development.

The Workgroup recommends continued investment in:

- Trail News bi-monthly newsletter
- The newly-launched Substack Project
- Virtual scholarly symposia
- Monthly videocast programming
- Digital archives and educational content
- Enhanced online membership recruitment strategies

Digital engagement allows the Alliance to reach broader audiences while complementing local and in-person programming.

5. Building Strategic Partnerships and Collaboration

Long-term growth will depend on stronger collaboration:

- Across national, regional, and chapter levels within the Alliance

- With businesses, schools, universities, libraries, tourism organizations, environmental groups, tribal partners, and public agencies

Strategic Imperative. To reverse member decline and build a thriving future, the Alliance must:

- Adopt an “Always Be Closing” mindset by integrating membership recruitment into every program and initiative
- Prioritize local, experiential programming as the primary engine for growth
- Invest in educational partnerships that inspire future generations
- Expand digital outreach and accessibility
- Strengthen organizational infrastructure to support chapters and regions
- Foster collaboration across Alliance units and external partners

With intentional focus in these areas, the Alliance has a powerful opportunity not only to grow membership, but to build a dynamic, intergenerational community that carries its mission forward for decades to come.

II. INTRODUCTION

As part of the Future State initiative, this report offers recommendations for Alliance programming at the local and national levels. These recommendations are designed to address the Alliance’s most pressing challenge—declining and aging membership—while continuing to serve current members effectively.

We propose a more intentional, outward-facing approach across the organization. Locally based programming—led by regions and chapters and strengthened through partnerships with businesses, educators, and community organizations—offers the most effective path forward to grow membership, particularly among younger audiences.

III. BACKGROUND

The Programming Workgroup was charged with developing recommendations for Alliance programming over the next 3-5 years in a rapidly changing environment. The Workgroup includes Ali Chouhdry, Ted Kaye, Laura Keller, Shannon Kelly, Gary Kimsey, Richard Welch (chair), and Kristen Zane. The group met eight times over five months, and received valuable contributions from Pat Traffas, Yvonne Keane, and Richard Hunt.

Our analysis followed four steps:

1. Define the primary challenge facing the Alliance— declining and aging membership.

2. Envision the organization's desired state in 3-5 years.
3. Identify actionable steps to achieve that vision.
4. Determine which groups are best positioned to execute these strategies.

IV. DISCUSSION

A. THE PRIMARY CHALLENGE

Like many membership-based organizations, the Alliance faces a significant membership challenge. Younger generations are less likely to join organizations than in the past.

Membership peaked at approximately 3,700 during the Lewis and Clark Bicentennial in 2004. Since then, it has declined steadily to approximately 838 members as of June 2026. This decline has significantly reduced dues-based revenue. At the same time, the membership base is aging. Nearly 80 percent of members are over age 65. Approximately three-quarters are retired. This creates an urgent to attract new—and especially younger—members to ensure long-term sustainability.

The Workgroup recommends a coordinated, organization-wide response. All programming—local and national—should serve two purposes:

1. Provide value to current members.
2. Actively recruit new members.

Programming should be designed with a clear goal: expand membership, particularly among younger audiences. This requires a more outward-facing approach that appeals to broader communities. In practical terms, every program and event should serve as a recruitment opportunity – embracing the mindset of “Always Be Closing.”

B. SPECIFIC PROGRAMMING RECOMMENDATIONS

Survey data confirm the commonsense notion that members and potential members most value locally-based programming. People enjoy social interaction and seek activities and events close to home. Proximity matters. Accordingly, programming sponsored by regions and chapters offers the greatest opportunity to serve current members and attract new members. The survey data further show that national programming remains valuable but has limited direct impact on membership growth.

The Alliance is a volunteer organization. This presents challenges to executing locally-based programming. Many of our volunteer leaders are already operating at or beyond capacity, and even well-conceived initiatives may struggle because there is not a sustainable mechanism in place to support implementation at the local level.

Accordingly, there is a need to strengthen organizational infrastructure to support chapter and regional programming. The Future State workgroups recommend that the national organization recruit and hire a dedicated professional staff person focused specifically on local support, programming assistance, engagement, and project execution. This Trail Ambassador could coordinate programming efforts, assist with event planning and publicity, support membership recruitment, and provide grant development assistance for local initiatives. Secondly, this role could help establish and maintain stronger partnerships with peer interpretive organizations along the Trail. The Trail Ambassador could strengthen communication and collaboration across the organization—between national, regional, and chapter levels—resulting in enhanced local programming.

Another important strategy to reduce the burden on local units is to intentionally develop programming with partner organizations. Collaboration can significantly expand our capacity. Partnerships between Alliance units and local businesses, schools and universities, libraries, chambers of commerce, museums, interpretive centers, environmental and cultural organizations, Tribal Nations, outfitters, and federal and state partners (e.g., the National Park Service and the National Forest Service) can result in successful programming and attract new members.

The Programming Workgroup recommends programming in the following categories:

1. EDUCATION

Engagement with educators and students represents one of the Alliance's greatest opportunities for growth. Teachers influence future generations, making education a powerful pathway for long-term membership development. We recommend the following key initiatives to encourage teachers and students to join the Alliance at the discounted educational membership level:

- **Virtual Reality Experience.** The Alliance has partnered with Shenandoah University in Winchester, Virginia to advance that school's immersive Lewis and Clark Virtual Reality Experience. Supported by a grant from the Alliance, students in 2024 traveled the Trail shooting 360 degree and drone video footage and conducting on-camera interviews with experts. In the university's advanced laboratory, the student then produced a virtual reality experience. Wearing an advanced headset, the user explores the Trail

virtually—for example, in the keelboat, at Fort Mandan, or along the Oregon coast. Supported by a second Alliance grant, a new group of students traveled the Trail in May-June 2026, shooting more video and interviewing additional experts to augment its current Virtual Reality Experience. We believe the Virtual Reality Experience has great potential in classrooms, libraries, museums, and interpretive centers to appeal to wider audiences and attract new members, especially students.

RECOMMENDATION: Regions and chapters partner with local schools, universities, libraries, interpretive centers, and museums to integrate the Virtual Reality Experience.

GOAL: Introduce the Virtual Reality Experience into:

- 10 high schools
- 5 universities
- 5 local libraries
- 5 interpretive centers or museum

in twelve months.

WHO: Regions and chapters lead outreach; national office supports funding and advanced headset acquisition to gift to Alliance partners.

- **Corp of Discovery Curriculum Guide.** In recent years, the Alliance updated its classroom curriculum guide to assist teachers. Although originally designed with middle and junior high school students in mind, in practice, the guide was used by educators from K-12, university, and elder hostel programs, as well as museums, interpretive centers, and similar institutions. The guide is designed to be flexible, enabling teachers to take the lesson plans, activities, and other resources and adapt them to their classroom settings. The Curriculum Guide is freely available on the main Alliance website.

RECOMMENDATION: Promote the Curriculum Guide in schools and at educator conferences, ideally paired with the Virtual Reality Experience. In the past, for example, Alliance representatives appeared at an annual meeting of the national organization of school boards and principals, and was well-received. Develop a method to track how many users access the Curriculum Guide and, if possible, capture their email addresses.

GOAL: Introduce the guide into 10 middle or junior high schools within twelve months.

WHO: Regions and chapters lead. The Education and Scholarship Committee supports with promotional materials.

- **Teachers on the River (Missouri River pilot project).** Recent increases in grant funding through Missouri Humanities (from \$5,000 to \$15,000) create new opportunities for collaborative, place-based programming. A pilot concept under development would bring together partners including the Alliance's Southern Prairie Region (as grant applicant), Missouri River Relief (boats and technical expertise), St. Charles Boathouse, Friends of the Kaw, Fort Osage, Missouri Department of Conservation, and other regional collaborators. This program would offer social studies and history educators in Kansas City, mid-Missouri, and St. Louis:

- A guided, on-river experience
- Historical and ecological learning
- Complimentary education-level memberships, directly linking program participation to long-term engagement with the Alliance (Note: this is a useful model for other Alliance programs where participants who pay a fee to attend the program are given complementary education-level memberships.)

This model mirrors successful efforts like Lolo Trail stewardship, and is inherently replicable – particularly in states like Oregon, where funding support through state humanities and historical organizations is similarly strong. At this event, Alliance representatives could promote the Virtual Reality Experience and the Corp of Discovery Curriculum Guide to participating teachers.

Thanks to the Alliance's Lou Ritten for bringing this idea to the Workgroup's attention.

- **Educational Outreach to Local Libraries.** Libraries represent accessible and scalable strategic partners. They provide opportunities for both youth and adult engagement through speaker series, reenactors, hands-on educational activities, Virtual Reality experiences, and community programming. Successfully leveraging local libraries, however, will require intentional relationship-building and local partnership cultivation.
- **Potential Student Simulation.** The Education Division of the Ronald Reagan Library in Simi Valley, California works with schools throughout the nation to

instill leadership qualities in students. Among other initiatives, the Education Division produces simulations in which students play leadership roles in important moments in American history. For example, it has produced an exercise simulating the decision-making process that led to the military invasion of Grenada to rescue American medical students on the island. Representatives of the Alliance have had preliminary discussions with the staff of the Education Division about the possibility of partnering to produce a simulation for students illustrating leadership qualities on the Lewis and Clark Expedition. This is a potential longer-term project.

2. THE ANNUAL GATHERING

The Annual Gathering remains a highly valued event for many Alliance members, offering connection, learning, and shared experiences. The Programming Workgroup recommends that the organization continue this important event.

A large majority of members, however, do not routinely attend the Annual Gathering. In recent years, attendance has been under 150 and declining. This trend likely will accelerate as the average membership age steadily increases. Substantial barriers limit attendance. Chief among them: distance, money, and time. Attendees often must travel significant distance to attend the gathering, travel and lodging costs are substantial, and members who work often cannot take personal time to attend this multi-day event.

RECOMMENDATION: Establish a task force or committee to evaluate and improve accessibility and impact, and report to the Board of Directors in six months. Key considerations:

- Schedule the gathering over a weekend to lessen the time constraints on working members.
- Increase partnerships with local businesses, schools, universities, libraries, and other community partners.
- Design for recruitment (especially educators and students). Consider staffing a table to sign up new members.
- Offer virtual access (Zoom, recordings) for non-attendees.

- Include more experiential activities and fewer lectures (but maintain anchor events such as the Moulton Lecture).
- Consider regional events to complement (but not replace) the Annual Gathering.

3. PUBLICATIONS

The Alliance currently offers four publications:

- **We Proceeded On**. This is the Alliance's flagship publication. Offered on a quarterly basis, this highly respected scholarly magazine was listed in the recent survey information as the primary reason people join the Alliance. The Workgroup recommends maintaining the magazine as it currently is. We suggest future consideration by the Editorial Board and the Board of Directors of how We Proceeded On might be offered more broadly in conjunction with the new and evolving Substack Project, described below.
- **The Orderly Report**. The quarterly member newsletter was the Number 2 top "Value" for members in the recent survey. The Workgroup recommends maintaining the publication as it currently is.
- **Trail News**. Launched in 2024, this free bi-monthly electronic newsletter has proven extremely popular among non-members. As of October 2026, this publication has over 3600 recipients and its subscribership continues to grow. The Workgroup recommends maintaining this publication as it currently is. The Alliance could consider, as appropriate, invitations for readers to become paid members.
- **Substack Project**. The newest electronic publication, launched in March 2026, the Substack Project has the potential to become the Alliance's leading communication channel to non-members and to help increase membership and funding. The project consists of weekly online distributions of two articles – one in history and the other in travel, both related to Lewis and Clark. The project will expand national awareness of the Lewis and Clark National Historic Trail as well as the Alliance, and convert digital audiences into Trail travelers and Alliance members. Readers may now access Substack articles free of charge, although the plan is to convert readers to paid subscribers over time. This is a transition that other Substack

publishers have accomplished. The Workgroup recommends maintaining the Substack Project as it currently is, with a review in 18 months to assess progress.

4. DIGITAL LIBRARY PLATFORM

The Alliance is exploring the development of a member-focused digital library platform using a service such as OverDrive/Libby. This would provide a highly differentiated member benefit featuring Lewis and Clark-themed eBooks, audiobooks, podcasts, and educational materials.

5. WEBSITES

The Alliance's websites are experiencing significant traffic growth (nearly 8 million views in January-April 2026). The challenge is converting viewers into members.

The Alliance currently maintains four websites:

- **Main Alliance website.**
- **Discover Lewis and Clark.** This is the Alliance's travel website.
- **Lewis and Clark Trail Experience.** This is the Alliance's educational website.
- **Trail Research.** Recently launched, this is a specialized archival clearinghouse of historic trail research. The website is publicly available. It is particularly useful to researchers.

6. SCHOLARLY SYMPOSIA

We recommend starting quarterly online "conversations" hosted by a nationally recognized Lewis and Clark scholar/author. These would help capture and preserve the wealth of knowledge and experience of noted experts in the field and could feature up-and-coming scholars and authors. The programs could be 90 minutes long and accessible to interested people throughout the country. Recordings could be posted to the Alliance website. We could consider charging a fee for non-members, which would entitle them to a one-year membership in the Alliance and could fund honoraria for the hosts.

RECOMMENDATION: Establish a new scholarly symposium program to be held online.

GOAL: Begin this series in the latter half of 2026, and strive to hold 3-4 per year.

WHO: We likely would need to establish a new committee or task force to launch and manage this initiative.

7. RECURRING VIDEOCAST PROGRAM

A monthly high-quality Zoom presentation jointly produced between the national office and local chapters or regions could serve multiple purposes: member engagement, public outreach, prospect acquisition, and digital content creation. Registration through the new membership system would allow us to capture participant data and build prospective membership pipelines for ongoing marketing and engagement efforts. Recorded programs would then become part of a growing member-exclusive digital video archive. Annual Gathering presentations could likewise be professionally captured and added to this library.

8. TRAVELING EXHIBITS

We recommend producing new traveling exhibit initiatives modeled after the highly successful “Traveling Maps of the Expedition” program. Portable exhibits focused on themes such as People of the Expedition, Plants of the Expedition, Indigenous Nations, or the Scientific Legacy of the Expedition could significantly expand outreach opportunities with museums libraries, visitor centers, and interpretive partners while simultaneously increasing visibility for the Alliance.

C. “BEST PRACTICES” BY REGIONS AND CHAPTERS

This section compiles some of the most popular and successful program offerings by Alliance regions and chapters and makes additional suggestions. This can guide other regions and chapters as they present programming in their local communities. We recommend that every chapter and region has at least one viable signature project or focus area. Examples could include Trail stewardship activities, speaker programs, youth engagement, interpretive partnerships, or Virtual Reality experiences. These localized initiatives become important vehicles for visibility, partnerships, new member recruitment, and sustained engagement.

1. TRAIL AND RIVER CLEANUP AND STEWARDSHIP

- The Lolo Trail Project is an outstanding example of the power of collaboration with local partners to achieve successful programming, as well as funding

signature events through grants. The Idaho Chapter has partnered with Traveler's Rest Connection, the Idaho Trails Association, the Trust for Nez Perce Trail, Lewis and Clark Trail Adventures, local businesses, and the U.S. Forest Service to clean up and maintain the Lolo Trail and to sponsor an annual trail race. This project is funded through grants from OnX, Yamaha, and Athletic Brewing, as well as Trail Stewardship support from the Alliance. Contacts: Chuck Raddon, idahoclarkie@gmail.com; Richard Hunt, director@lewisandclark.org.

- The Jefferson River chapter partners with environmental groups to clean up that river. Contact: Tom Elpel, thomasjelpel@gmail.com.
- Missouri River Relief, a frequent grant awardee, does regular cleanups on the Missouri River in that state.

2. SPEAKER SERIES

- The Portage Route Chapter and the Lewis and Clark Trail Interpretive Center in Great Falls host the Ida Bell Speaker Lecture Series. Speakers receive an honorarium. Talks are recorded. Going forward, selected recordings may be posted to the Alliance's main website to reach broader audiences. Contact: Carol Bronson, cwbronson@outlook.com.

3. STUDY GROUPS AND BOOK CLUBS

- Mouth of the Platte Chapter study group. Contact: Keith Bystrom, knbystrom68@gmail.com
- Southeast region book club.

4. GUIDED WALKS/HIKES/CANOE TRIPS

Such trips can have themes connected to Lewis and Clark, the journals, or related topics. Make sure to note the length or intensity of the outing in advertising so participants know ahead of time what to wear or bring and whether the event is right for them.

- Pacific Northwest region. Contact: Alisha Hamel, alishahamel@gmail.com.

5. LOCAL RESTAURANT/BAR EVENTS

Walking tours, pub or restaurant crawls, and/or pedal trolley tours in trail towns either led by an Alliance member or partnered with local history tour groups. Lewis and Clark trivia contests at local breweries, restaurants, or other locations that hold such events. Many establishments allow non-profits to host a night with questions relevant to their mission and share part of the proceeds with that organization. This is a good way to appeal to younger audiences.

- Friends of Pompey's Pillar holds Lewis and Clark trivia nights in Billings area breweries and wineries.
- Montana Historical Society sponsors events with Montana history and geography questions, American Prairie night with questions on bison and prairie ecosystems, Montana Wild doing bear night with questions on bears, bear safety, etc.

6. PRESENCE AT COMMUNITY EVENTS

Staff a table at community events like fairs, history festivals, conventions, etc. The national office could provide banners, brochures, and other promotional materials. The region or chapter can also provide localized information regarding Lewis and Clark sites and Alliance activities. This is an excellent way to recruit new members.

- Upcoming Western History Association in Portland?

7. VIRTUAL PRESENTATIONS

When appropriate, consider using Zoom as a means to allow more people to attend events. Chapters and regions can receive Zoom hosting access support from the national office.

V. CONCLUSION

The Programming Workgroup believes the Lewis and Clark Trail Alliance stands at an important moment of opportunity and transformation. While the organization faces significant challenges related to declining and aging membership, it also possesses tremendous strengths: a compelling national story, passionate volunteers, respected publications, expanding digital platforms, strong regional leadership, and deep community partnerships across the Trail.

The future success of the Alliance will depend on its willingness to adopt a more intentional, outward-facing approach to programming and engagement. Every program—whether local or national, in-person or digital—should serve two purposes:

1. Provide meaningful value to current members
2. Actively attract and engage new audiences

The Workgroup emphasizes several key priorities moving forward:

- All Alliance programming should support membership growth and public engagement.
- There is an urgent need to attract younger audiences.
- Locally-based, experiential programming offers the greatest opportunity for long-term impact.
- Educators, students, schools, universities, and libraries represent critical pathways to future membership growth.
- Digital outreach and virtual programming must continue to expand and evolve.
- Partnerships and collaboration are essential to increasing organizational capacity and visibility.
- Stronger infrastructure and implementation support are necessary to sustain local programming efforts.

The Alliance's future will not be secured through any single initiative, but through a coordinated culture of engagement, collaboration, innovation, and recruitment across the entire organization. With intentional leadership and a shared commitment to growth, the Alliance has an extraordinary opportunity to build a vibrant, intergenerational community that preserves, interprets, and celebrates the enduring legacy of the Lewis and Clark story for decades to come.

LCTA Financial Viability Workgroup

Project Report to LCTA Board of Directors (REV, v4)

June 8, 2026

Problem Statement - The Lewis & Clark Trail Alliance continues to experience a growing gap between its mission ambitions and the financial capacity of its traditional revenue model. Since the Board of Directors adopted the current strategic plan in 2024, LCTA has made measurable progress in expanding digital platforms, increasing public engagement, and strengthening Trail-wide visibility.

However, traditional funding sources, particularly membership and annual giving—have not kept pace. Changing demographics, evolving social behaviors, and declining participation in traditional membership organizations have further weakened the effectiveness and appeal of the organization’s long-standing membership value proposition.

New financial initiatives, including monetization of the Lewis and Clark Trail Experience travel platform and increased emphasis on grant funding, have generated incremental revenue growth, however, these gains have not been sufficient to supplant the shortfall in the organization’s historic funding model.

As a result, the Alliance remains financially vulnerable and limited in its ability to invest in staffing, outreach, and long-term organizational capacity, underscoring the urgency for a stronger, more modern, and diversified financial model.

The Future State Initiative is built on a simple but transformative premise: the Lewis & Clark Trail Alliance must move beyond a survival-based funding model and establish a sustainable growth engine capable of supporting the organization for the next generation.

Future State Vision-

In the future, the Lewis & Clark Trail Alliance (LCTA) will continue as the leading national steward, storyteller, and innovator for the Lewis and Clark Story and Trail and all it encompasses. The organization will have evolved from a primarily membership-funded nonprofit into a modern, financially resilient, mission-driven institution that blends the traditional benefits of membership with heritage, education, outdoor recreation, and digital engagement to reach millions of people every year.

LCTA operates as a **Trail-wide hub**—supporting partners, elevating Tribal voices, expanding educational resources, and offering both physical and digital experiences that bring the Trail to life for new audiences. The organization is recognized nationally for its ability to connect history with contemporary relevance, cultural tourism, and experiential learning

In this envisioned future, LCTA is:

1. Financially Strong

A diversified and sustainable revenue model fuels the organization. No single source—membership, grants, digital sponsorships, or philanthropy—dominates the budget. LCTA builds and maintains reserves, invests in innovation, and has the organizational capacity to operate effectively.

2. Member Focused

Recognizing that LCTA members remain the backbone of an effective platform to deliver and represent the face of the organization

3. Digitally Powerful

Digital platforms—including LCTE, Discover Lewis & Clark, Substack, and emerging mobile experiences—reach millions of users annually, generating both public impact and revenue through outreach, sponsorships, partnerships, and earned media visibility. These platforms are linked through intentionally aligned messaging, audience strategy, and delivery methods.

4. Trail-Wide and Collaborative

Staff work directly with Interpretive Centers, Museums, Tribes, State tourism agencies, and NPS partners to help shape visitor experiences, champion historic integrity, and promote responsible stewardship of Trail landscapes.

5. Program-Rich

Local and National programs in education, storytelling, Tribal engagement, conservation, and heritage tourism are well-funded and consistently supported to achieve the desired impact.

6. Staffed for Success

A professional team of 3-5 full-time staff (supported by contract magazine editing and accounting) leads digital innovation, membership growth, education, communications,

fundraising, partner engagement, and Trail-wide initiatives—with volunteer regions and chapters empowered rather than burdened.

Proposed Initiatives to Achieve Future State:

1. Modernization of Membership and Audience Engagement

- (note this is an overlap with Public Engagement)

Improve existing membership and audience engagement strategy designed to increase public awareness, strengthen participation, and convert digital audiences into long-term supporters of the Trail.

Simplify, enhance, and modernize the membership structure

- Development of clear and easy-to-understand membership tiers aligned with existing member behavior and new audience opportunities. (proposed structure to be attached)
- Expansion of member benefits to include existing and newly created digital and print publications (WPO, TOR, Trail News, Substack), archival access (WPO), exclusive video content (existing and new), digital libraries (new initiative), member experiences (Annual Gathering), local engagement opportunities, and reciprocal benefits with partner institutions (system to be created).

Digital Publications

- Growth of paid digital subscriptions and exclusive member content.
- Continued growth of Substack and other digital publishing platforms as audience development and conversion tools.
- Position *We Proceeded On* (WPO) as a premier intellectual and editorial asset capable of reaching audiences beyond traditional membership distribution.
 - By leveraging modern publishing platforms and digital subscription models, WPO can increase audience reach and recurring revenue opportunities.

Member Management System

- Evaluation and implementation of a modern CRM and membership management system capable of supporting digital engagement, automated renewals, member portals, digital identification, and geographically targeted outreach.

Partnering with Peer Organizations

- Strengthen collaboration across the Trail by establishing peer relationships with museums, interpretive centers, friends' groups, visitor centers, and related organizations.

- Collaborative marketing,
 - Shared programming,
 - Develop rotating exhibits (i.e. Maps of the Expedition)
 - Event and visitor engagement marketing and promotion
- Exploration of an “Affiliate Membership” category that provides low-barrier engagement opportunities (low cost, reduced benefits) for newsletter subscribers, partner organizations, and digital audiences, creating a funnel toward full membership and participation.

2. Expand Regional Capacity and Organizational Support

Invest in organizational capacity through the creation of a staff support position focused on chapter and regional development, a Trail Ambassador.

This role would assist local leaders in planning and executing programming, events, membership recruitment efforts, publicity, and community engagement activities. The position would also support regional grant development, partnership cultivation, and coordination with peer interpretive organizations.

The long-term goal is to strengthen regional activity, increase local participation, and create sustainable engagement opportunities that connect communities more directly to the national organization and Trail mission.

3. Strengthen Individual Giving and Donor Development

Develop a long-term fundraising strategy centered on increasing annual giving, recurring donor participation, and donor stewardship.

A central component of this effort would be the expansion of the President’s Fund as the Alliance’s primary strategic investment vehicle. Rather than functioning solely as a reserve fund, the President’s Fund would serve as catalytic capital to support organizational modernization, digital expansion, audience development, and long-term sustainability initiatives.

Fundraising priorities include:

- Launching annual Trail-focused fundraising campaigns tied to heritage tourism, education, stewardship, and digital engagement.
- Establishing a recurring monthly donor program such as “Friends of the Trail.”
- Enhancing donor stewardship through personalized communications, impact reporting, and stronger relationship management.
- Leveraging existing matching gift opportunities to stimulate campaign participation and momentum.

4. Launch Major Fundraising Initiatives

- Prepare for a mid-scale capital or capacity campaign
- Promote planned giving opportunities for legacy-minded supporters.
- Requires a business development force

Two major fundraising initiatives are proposed:

Endowment Growth Campaign:

- A LCTA Endowment Growth Campaign offers members the unique opportunity to post tributes in honor of the Lewis and Clark Expedition. This initiative allows each LCTA member to share personal reflections or memorials, highlighting individual or historical aspects of the Expedition that have inspired them.
- Each tribute is recognized on a virtual map that traces the routes of the Lewis and Clark Expedition, including both main and sketch map routes. A marker—proposed as a blue trade bead—denotes the approximate location related to the tribute, rather than a precise GPS point. This trade bead serves as an interactive link, allowing viewers to access the written memorialization. To make navigation easier, each bead may include an identifier, enabling users to quickly locate individual tributes.
- Over time, the collection of tributes will form a living, evolving record—a written interpretation of the Lewis and Clark Expedition as seen through the eyes of LCTA members. This ongoing compilation will continue to grow, reflecting how individuals interpret and connect with the Expedition in their own words.

Planned Giving / Legacy Giving Campaign:

With an average member age of 70+, LCTA has an opportunity to encourage members to consider a Legacy Gift or include LCTA in their estate planning.

A call for IRA contributions through Qualified Charitable Donations (QCD's) was published in March TOR. Plan to promote again in fall TOR and in spring and fall annually.

Accordingly, we have drafted flipbook to provide helpful information for estate planning and provide options that best match our members' giving needs. Link to this flipbook: <https://publuu.com/flip-book/561309/2436609>

5. Expand Grant Development and Project Funding

Continue pursuing national, regional, and local grant opportunities that support education, preservation, interpretation, tourism, conservation, and technology initiatives.

The Alliance will work to establish a more coordinated grant development strategy that encourages both national-level initiatives and locally driven regional projects. Goals include:

- Maintaining multiple active national grant initiatives annually.
- Encouraging each chapter or region to develop at least one active project or grant-supported initiative.
- Utilizing allowable administrative overhead from grants to support organizational sustainability and operational capacity.

This initiative supports both mission delivery and long-term financial diversification.

6. Build Strategic Corporate and Foundation Partnerships

Develop diversified earned revenue strategies that leverage the Alliance's growing digital reach, interpretive expertise, and tourism platform infrastructure.

Expand partnerships with corporations, foundations, tourism organizations, and outdoor recreation companies whose missions align with conservation, heritage tourism, education, technology, and public engagement.

The Alliance will develop structured partnership opportunities, including "Official Trail Partner" sponsorship packages, collaborative programming initiatives, and targeted project funding opportunities that advance both organizational sustainability and public impact.

Recommended Actions for the Lewis & Clark Trail Alliance

1. Create a Trail Engagement and Partnership Position

Recommendation: Establish and fund a full-time Trail Engagement Manager (Regional Activation Manager/Trail Advocate) responsible for chapter support, partner development, local program activation, and representing LCTA throughout the Trail corridor.

Purpose:

- Activate Local Programming, Increase local engagement, and stimulate chapter vitality.
- Expand and leverage partnerships and affiliate relationships.
- Support program delivery and membership recruitment.

Success Measures:

- Increase active chapters and regional activities.
- Growth in affiliate partners.
- Growth in membership and event participation.

2. Modernize the Membership Program

Recommendation: Implement a simplified membership model with expanded benefits and clear pathways for individuals, families, organizations, and affiliates.

Actions:

- Preserve existing memberships during transition.
- Introduce simplified membership tiers.
- Create affiliate membership options for organizations.
- Bundle digital benefits and content to enhance value proposition

Core Member Benefits:

- *We Proceeded On*
- Digital Sherman Library access
- Event discounts
- Exclusive webinars and programming
- Partner discounts and opportunities

Success Measures:

- Membership growth.
- Improved retention rates.
- Increased member satisfaction.

3. Invest in a Modern Constituent Management Platform

Recommendation: Replace DonorPerfect with an integrated CRM that combines membership, fundraising, events, communications, and reporting.

Purpose:

- Reduce administrative burden.
- Improve donor cultivation.
- Improve member engagement and reporting.

Success Measures:

- Increased fundraising efficiency.
- Improved renewal and donor retention rates.
- Reduced staff administrative time.

4. Adopt a Content-Driven Growth Strategy

Recommendation: Treat content as a core organizational asset and primary audience-development tool.

Actions:

- Use content to drive membership, donations, tourism, and public engagement.
- Consolidate a unified content strategy.
- Expand video production content capture and distribution
- Establish Digital Library
- Leverage Publications (WPO, Substack, Trail News) and WPO archives
- Continue Social Media and Websites (DLC, LCTE, Trail research)

Priority Content Areas:

- Video presentations and interviews.
- Monthly virtual programming.
- Educational resources.
- Heritage tourism content.

- Trail stewardship stories.

Success Measures:

- Audience growth.
- Website traffic.
- Membership conversions from digital audiences.
- Monetization of assets

5. Establish a National Programming Council

Recommendation: Create a volunteer-led National Programming Council to coordinate and expand educational and public engagement programs.

Responsibilities:

- Support Annual Gatherings.
- Develop webinars and virtual events.
- Coordinate speaker programs.
- Expand educational and scholarly initiatives.
- Guide traveling exhibits and curriculum development.

Success Measures:

- Increased annual programming.
- Greater audience participation.
- More partner involvement.
- Provide local engagement through national led programs

6. Develop the Digital Sherman Library as a Signature Program

Recommendation: Make the Digital Sherman Library a national educational resource and member benefit.

Actions:

- Establish a national Lewis & Clark digital lending library via Libby App
- Digitize key collections.
- Improve search and access.
- Promote nationally through universities and researchers.

Success Measures:

- Library usage.
- New memberships are attributable to library access.
- Academic and author partnerships.

7. Launch an Affiliate Partnership Network

Recommendation: Create a formal affiliate program for organizations that share LCTA's mission.

Potential Affiliates:

- Friends groups
- Libraries
- Museums
- Universities
- Historical societies
- Trail stewardship organizations

Benefits:

- Shared marketing.
- Program collaboration.
- Resource sharing.
- Joint fundraising opportunities.

Success Measures:

- Number of affiliates.
- Collaborative programs created.
- Membership referrals.

8. Build a Sustainable Revenue Strategy

Recommendation: Reduce reliance on membership dues by creating a diversified revenue portfolio.

Revenue Priorities:

1. Major gifts program.
2. Planned giving program.

3. Endowment growth campaign.
4. Foundation grants.
5. Corporate partnerships.
6. Program sponsorships.

Success Measures:

- Growth in unrestricted revenue.
- Endowment growth.
- Increased donor retention.