

# **C&O Canal Trust**

## **Strategic Plan**

### **2019-2023**

#### **A Letter of Invitation**

From the urban setting of Georgetown, past the busy suburbs, small towns, and bucolic farms of Maryland, to its terminus at Cumberland near the Pennsylvania border, the Chesapeake and Ohio Canal National Historical Park (C&O Canal NHP) is beloved by the approximately five million people who use it annually for recreation, exercise, and the enjoyment of history and nature. Almost entirely fee-free and close to major population centers, it is one of the most accessible and visited national parks in the nation, attracting higher annual visitation than either Yosemite or Yellowstone.

Yet, in an era when federal funding for national parks is diminishing, the number of people visiting the C&O Canal NHP each year is increasing. The resulting maintenance backlog (estimated at \$106.7 million) and reduction in National Park Service staff (50 percent smaller than a decade ago) is placing enormous strain on Park resources.

It is clear that the support provided by the C&O Canal Trust, as the C&O Canal NHP's official nonprofit philanthropic partner, has never been so important. This Strategic Plan is not primarily a response to these challenges. Rather, it is a roadmap that strengthens the Trust's position on the leading edge of a fundamental sea change underway from national parks owned, funded, and run on our behalf by Uncle Sam toward an era when these shared national treasures require that they be supported and stewarded more dynamically by "we the people".

As the keystone organization in the bridge between private citizens and the Park, the Trust provides the ways and means for all those who use the C&O Canal to contribute directly – through philanthropy, volunteerism, and advocacy – to the Park we love today and to the one we will leave to future generations.

From this perspective, the work of the Trust represents nothing less than the hope for our Park's future. This Strategic Plan, covering the period 2019 to 2023, lays out how we will carry the promise of that vision out into the community and invite people to become part of a growing national movement to take personal responsibility for the preservation of America's Greatest Idea – our national parks.

In 2021, the C&O Canal NHP will celebrate its 50<sup>th</sup> anniversary, and the C&O Canal Trust will be celebrating right beside it. There is much to celebrate – an extraordinary natural and historic treasure that could have become a highway, but which today is a gift of immeasurable value to a diverse citizenry living in proximity to the Park and beyond. This Strategic Plan lays out how the Trust, with the support of Park communities, will help the NPS to steward and preserve this treasure over the next five years.

We invite you to join us by taking your place in the story that began on July 4, 1828, when President John Quincy Adams broke ground for the building of the C&O Canal, and that continues to this day. This is our canal. This is your canal.

Robin Zanotti, President

Michael C. Mitchell, Chairman

## **C&O Canal National Historical Park Enabling Legislation**

Public Law 91-664, January 8, 1971

Establishment of Park

Sec. 3 (a) In order to preserve and interpret the historic and scenic features of the Chesapeake and Ohio Canal, and to develop the potential of the canal for public recreation, including such restoration as may be needed, there is hereby established the Chesapeake and Ohio Canal National Historical Park.

## **C&O Canal Trust Friends Agreement**

*Excerpt:* The Trust's sole mission is working in partnership with the National Park Service to protect, restore, and promote the Park, and to assist National Park Service in ensuring that the Park's natural, cultural, historic, and recreational qualities are enjoyed by current and future generations.

## **The Strategic Planning Process**

This strategic plan is the result of a collaborative effort shaped by stakeholder input spanning much of 2018. Early in the year, our leadership team elicited feedback and ideas through a stakeholder survey completed by over 500 constituents. We took deep dives by conducting 39 one-on-one interviews with partners, key donors, volunteers, and board members. In April 2018, the Board of Directors met with staff and C&O Canal National Historical Park staff in Sharpsburg, Maryland, for a full-day planning retreat to review programs, funding data, and research findings, and to chart a strategic path forward. The board's Strategic Planning Committee then worked with staff over subsequent months to refine the strategy and to create aspirational, but actionable, goals for the next five years. This plan is the result of that process.

Appendix A – Strategic Planning Process

Appendix B – C&O Canal Trust Board of Directors

Appendix C – C&O Canal Trust Staff

Appendix D – Strategic Planning Interviewees

## **Our Mission**

The C&O Canal Trust, as the official non-profit partner of the Chesapeake and Ohio Canal National Historical Park, works in partnership with the National Park Service and local communities to raise funds to preserve the Park for future generations and to broaden support through programs that highlight the Park’s historical, natural, and cultural heritage and recreational opportunities.

## **Our Vision**

The C&O Canal Trust is the highly-visible, well-respected nonprofit leader of the C&O Canal community, linking private citizens, organizations, and state and local governments with the C&O Canal National Historical Park. With the engagement of all stakeholders, we see a safe and well-preserved park, its iconic towpath running uninterrupted for 184.5 miles through diverse landscapes and populations, supported by the communities it touches, and connecting, now and into the future, all who embrace the idea of the C&O Canal as “My Canal.”

## **Our Guiding Principles**

- **Robust Partnership**  
We provide the highest standard of philanthropic support to our Park partner as we work with the National Park Service towards a shared vision for the preservation and enhancement of the natural and historic character of the Park.
- **Focused Stewardship**  
We thoughtfully steward our philanthropic, volunteer, and other resources to engage in projects and programs that will have the greatest positive impact on the Park both today and into the future.
- **Community Inclusion**  
We welcome the geographic, demographic, and economic diversity of our Park communities, seeking as far as possible to meet these diverse stakeholders “where they are.”
- **Operational Excellence**  
We maintain an organization that is lean, innovative, transparent, and trustworthy.

## **C&O Canal Trust Strategy 2019-2023**

### **I. Protect, Preserve, Restore**

***We will protect, preserve, and restore the signature infrastructure of the C&O Canal National Historical Park: the towpath, canal, historic structures and cultural landscapes, natural resources, and adjacent trails.***

### **Strategic Goals**

1. Protect, preserve, and restore the C&O Canal and its historic infrastructure through innovative programs and advocacy.
  - a. Preserve and maintain seven historic lockhouses through our award-winning Canal Quarters interpretive program.
  - b. Expand the Canal Quarters program by opening a seventh lockhouse and laying the groundwork for the addition of more lockhouses to the program.
  - c. Preserve and maintain Park structures through community volunteer support.
  - d. Advocate for government funding to improve the infrastructure of the canal allowing it to hold water in the Great Falls National Interpretive Center zone (Anglers – Swains Lock, plus water delivery and intake at Inlet Lock 2).
  - e. Respond to urgent Park needs due to natural disasters.
2. Improve the surface of the towpath for a safe, accessible, and continuous trail.
  - a. Raise funds annually to support trail improvements for the 80 miles of towpath in most need of rehabilitation and to ensure the Towpath's continuity from Georgetown to Cumberland.
  - b. Advocate for government funding for towpath surface improvements.

## **II. Enhance the Visitor Experience**

***We will deepen the visitor experience with improved Park amenities, enriching interpretive activities and trip-planning tools, and partnerships with local stakeholders to weave the Park and its assets into the communities that surround it.***

### **Strategic Goals**

1. Improve the access, aesthetics, and usability of high visitor use areas of the Park.
  - a. Implement projects that address historic structures, campgrounds, trail maintenance, trash and invasive plant removal, and Park beautification.
  - b. Place donor-sponsored benches in the Park for the comfort of visitors.
  - c. Improve the accessibility of the Canal Quarters lockhouses.
2. Help visitors plan their trips and navigate the Park.
  - a. Brand trip-planning tools under one umbrella and promote these tools to visitors.
  - b. Develop a volunteer Canal Ambassador Corps to extend the ability of the Trust to provide visitor services and to more frequently engage with constituents both in the Park and beyond its boundaries.

3. Provide visitors with unique, high-quality, interpretive experiences in historic lockhouses via the Canal Quarters program.
  - a. Enhance the visitor experience of the Canal Quarters program by more fully developing volunteer opportunities, embracing 21<sup>st</sup> Century interpretation, and strengthening program evaluation.
  - b. Promote the Canal Quarters program.
4. Enhance C&O Canal visitor experiences within the communities that border the Park.
  - a. Work with the surrounding communities and partner organizations, such as the Canal Towns Partnership, Convention and Visitor Bureaus, and Heritage Areas, to promote economic growth and heritage tourism opportunities through Park visitation, promotional opportunities, and events.

### **III. Build a Community of Support and Stewardship**

*We will rally philanthropic, volunteer, and advocacy support from our geographically and demographically diverse Park communities, engaging with them “where they are” to foster a shared sense of responsibility for the preservation of the C&O Canal National Historical Park.*

#### **Strategic Goals**

1. Grow philanthropy, volunteerism, and advocacy among Park users and stakeholders by building a broad and inclusive C&O Canal community, dedicated to working with the C&O Canal Trust to preserve the Park.
  - a. Through donor-centric communications and outreach, foster a sense of individual and collective responsibility for the Park that results in increased giving, volunteerism, and other support.
  - b. Increase the Trust’s physical presence throughout the Park to raise funds and bring the Trust’s mission to visitors “where they are.”
  - c. Host community-building events that bring together different Park constituencies.
  - d. Partner with the National Park Service, other friends groups, and canal communities to celebrate the Park's 50th anniversary in 2021.
  - e. Promote co-branded community engagement opportunities in the Park.
  - f. Build relationships with Park partners by capitalizing on mission overlap.
  - g. Coordinate efforts with national advocacy groups.
2. Engage the next generation of Park stewards.
  - a. Provide vital financial support for Canal Classrooms.
  - b. Engage youth volunteers.
  - c. Provide employment opportunities for youth and young professionals.
  - d. Engage young professionals as volunteers, donors, and advocates.

3. Convene and lead groups of stakeholders, including gateway canal towns, neighboring communities, states and municipalities, local businesses, and other partners, in support of initiatives for the C&O Canal National Historical Park.
  - a. Meet with local community leaders to discuss the needs of the Park, and build strong relationships with government and elected officials for the benefit of the Trust and the Park.
  - b. Create a framework for the Canal Towns Partnership to support the Park through advocacy, volunteerism, and financial contributions.
  - c. Enable the business community to support the Park through volunteer service projects and financial support of park stewardship projects.
4. Extend outreach and programming to diverse populations so that Park visitation and stewardship resemble the communities that surround it.
  - a. Engage diverse audiences in inspiring programs.
  - b. Diversify Canal Trust volunteer force.

#### **IV. Achieve Operational Excellence**

*We aim to be one of the leading Friends group nationally, adopting best practices throughout all aspects of our mission.*

##### **Strategic Goals**

1. Deepen the partnership between the C&O Canal Trust and the C&O Canal National Historical Park through regular and open communication, co-sponsored programs, and a team-based approach to program management and problem solving.
  - a. Expand the synergies between the Trust and the Park.
  - b. Integrate efforts through the co-location of Park and Trust offices.
  - c. Work creatively with Park leadership to implement NPS Director's Order 21 governing donations and philanthropic partnerships.
2. Enhance and maintain the fiscal stability of the Trust through the attainment and maintenance of sufficient operating reserves and the growth of achievable operating budgets.
  - a. Build cash reserves sufficient to fund the equivalent of three months of operating expenses.
  - b. Set attainable annual budgets that incorporate growth and appropriately reflect the philanthropic capacity of our donor base.
  - c. Improve positive cash flow to accommodate seasonal and programmatic revenue and expense fluctuations.

- d. Establish a framework to manage investments for short- and long-term cash holdings, including endowment funds.
3. Increase development revenue sufficient to meet organizational growth objectives.
  - a. Project revenue for budgets based upon philanthropic potential.
  - b. Secure and steward a growing major donor base committed to the missions of the Park and the Trust.
  - c. Produce effective fundraising events that engage current and potential donors through the efficient use of resources.
  - d. Create a framework to establish, manage, and promote endowments.
  - e. Increase the membership in our legacy-giving program.
  - f. Balance fundraising resources between funding Trust operations and Park priorities to sufficiently meet annual needs.
  - g. Target fundraising communications to varied constituent groups.
  - h. Advocate for government funding of Trust programs and operations.
  - i. Grow event and program sponsorships in terms of numbers, revenue, and geographic reach.
4. Increase communications impact through branding and the use of engaging content targeted to varied constituent groups.
  - a. Amplify organizational branding to encourage a sense of individual responsibility for the Park and a belief that helping the Trust through volunteerism, philanthropy, and advocacy support is the most effective and trustworthy way to preserve the Park.
  - b. Adapt materials and website content to incorporate branding strategies.
  - c. Create engaging content for print, digital, video, and mobile platforms.
  - d. Track marketing and fundraising communications efforts for effectiveness, and adjust as needed.
  - e. Increase engagement with media and opinion leaders to enhance coverage of Trust programs.
  - f. Increase leverage of free and low-cost advertising and publicity opportunities.
5. Structure the Board and staff to achieve maximum organizational potential.
  - a. Strengthen the Board through focused recruitment and effective Board committees.
  - b. Review Board Policies to ensure that they reflect nonprofit best practices.
  - c. Devise and implement human resource policies to meet regulations and nonprofit best practices.
  - d. Create a desirable workplace for current and future employees.

- e. Grow and align Trust staff resources to effectively address priorities.
6. Improve business practices to enhance efficiencies.
- a. Review and adjust policies, procedures, and processes.
  - b. Upgrade technology to enhance staff efficiency.

## **Acknowledgements**

C&O Canal Trust Board of Directors (see Appendix B)

Kevin Brandt, Superintendent, C&O Canal National Historical Park

Ben Helwig, Partnership Coordinator, C&O Canal National Historical Park

Betsy Garside, Garside Group

C&O Canal Trust Staff (see Appendix C)

39 interviewees (see Appendix D)

540 anonymous survey respondents

National Environmental Education Foundation

Shepherd's Spring Outdoor Ministry Center

## **Appendix A**

### **Strategic Planning Process**

The stakeholder survey was emailed to our list of over 8,000 email addresses and was also shared on our Facebook and Twitter social media platforms. We had 540 responses, which is a 6.75 percent response rate. We acknowledge that the stakeholders responding to this survey were a group who already thought favorably of the C&O Canal Trust – we had their email address because they have donated, volunteered, done business with us, or requested that we stay in touch with them. Therefore, they have a working knowledge of our mission and programs, and their opinions do not necessarily reflect the opinions of all Park users, stakeholders, or potential donors. However, because of their familiarity with us, they were able to give us informed feedback on the areas they felt were important for the C&O Canal Trust to address in the next five years.

Respondents included constituents from across the country, but largely resided in Montgomery and Washington Counties in Maryland, Washington D.C, and Fairfax County in Virginia. Over 66 percent were donors, 40 percent volunteers, and 31 percent Canal Quarters guests. Responses to the questions did not show much variation between location of residence or relationship with



the Trust, indicating that Park users share the same needs from the C&O Canal Trust, regardless of their locale or use of the Park.

Respondents overwhelmingly identified activities affiliated with preserving the towpath, the canal, historic structures, and the natural habitat in the C&O Canal National Historical Park as their top priorities. This includes fundraising for preservation and beautification projects; completing the work through volunteerism via our Canal Pride and Canal Quarters programs; and advocating with local, state, and federal governments for support. These priorities were further highlighted through subsequent questions that explored what motivated their support for the Trust and respondents' open-ended comments at the end of the survey.

Respondents also showed support for the Trust's current programs and activities, with all selections ranking above the "neutral" opinion. This feedback illustrated that our constituents were pleased with our work over the past ten years and support continuation of these activities, which include the Canal Quarters and Canal Pride programs, our funding of Canal Classrooms, our work with the Canal Towns Partnership, our efforts in communicating and educating visitors about the history and natural resources of the Canal, and engaging new and diverse audiences with their local National Park.

We also spoke more in-depth with 39 key constituents, including all board members, several National Park Service staff members, major donors, volunteer project leaders, and partners, during hour-long interviews. Their feedback, although much more qualitative in nature than the survey results, showed much the same opinions.

## **Appendix B**

### **C&O Canal Trust Board of Directors**

Mike Mitchell, Chair\*

Steve Chaudet, Vice Chair

Kathy Poole, Secretary\*

Bert Swain, Treasurer

Sandra Adams

Wm. Randall Cone

Sherif Ettefa

Francis Grant-Suttie\*

John Guttmann

Don Harrison

Ed Kessler

Bill Newman

John Schnebly

Dan Spedden

Anthony Stacy

Sandy Vogelgesang

Anne Wallace\*

\*Member of Strategic Plan Committee

## **Appendix C**

### **C&O Canal Trust Staff**

Robin Zanotti, President

Patricia Barber, Director of Development

Becky Curtis, Director of Programs & Partnerships

Heidi Schlag, Director of Marketing & Communications

Jane Neff, Office Administrator

Josh Whitman, Volunteer Coordinator

Melanie Draper, Development & Communications Associate

## **Appendix D**

### **Strategic Planning Interviewees**

Sandra Adams

Betsey Bainbridge

Catherine Bragaw

Kevin Brandt

Denise Cetta

Michael Cetta

Steve Chaudet

Paul Chod

Ray Dinterman

Sherif Etefa

Francis Grant-Suttie

John Guttman

Don Harrison  
Jennifer Hearn  
Ben Helwig  
Bill Holdsworth  
Ed Kessler  
Maryanna Kieffer  
Bob King  
Lisa Landsman  
George Lewis  
Matt Liddle  
Mike Mitchell  
Bill Newman  
Kathy Poole  
Eddie Rivas  
John Schnebly  
Deborah Schumann  
Roy Sewall  
Chuck Short  
Dan Spedden  
Anthony Stacy  
Don Street  
Ingrid Sunzenauer  
Bert Swain  
MJ Veverka  
Sandy Vogelgesang  
Ira Wagner  
Anne Wallace