

## **C&O Canal Trust FY22 Operating Plan**

### **FY22 Program Operating Plan**

#### **Climate Analysis**

- COVID-19 still impacting all programs
  1. Canal Quarters has remained strong during FY21, with slight downward trends beginning to show in August as more people choose to travel a little further and schools begin to re-open.
  2. The transition resulting from the departure of Rod Newton created additional stress on the staff but momentum has been maintained. A search to find a new Program and Volunteer Coordinator will be completed in early FY22.
  3. Canal Community Days continues the cautious trend it began in late FY20 due to COVID-19 by organizing smaller, more spread-out volunteer events, including individual initiatives, rather than large, concentrated ones.
  4. Canal Towns Partnership has seen a shift in participating towns while continuing to support the park's 50<sup>th</sup> anniversary events, the World Canals Conference, and towns' celebrations in the midst of a lingering pandemic. The Partnership's ten-year anniversary celebration was cancelled due to health concerns; attempt to have an eleven-year anniversary.
  5. The Canal For All program has hit the ground running after a respite during the worst of the pandemic. Canal For All Coordinator Liz Janelle has reconnected the program with previous community partners and engaged new partners in Washington County. Montgomery County's TeenWorks program and other groups are focusing on fall and spring programming as well. The Conservation Jobs Corps program is expected to resume in July 2022.
  6. The Canal Stewards program has transitioned to the Trust with minimal loss of momentum, despite a change in leadership halfway through FY21. The program has more than doubled in capacity, adding active sites especially in Washington and Frederick Counties. Canal Stewards Coordinator Melissa Walker will continue recruitment in all counties.

#### **Key FY22 Objectives:**

- *Canal Quarters:* Due to COVID restrictions we will continue our focus on maximizing revenue and absorbing new cyclic maintenance responsibilities. Improve the visitor experience at a time when visitation is expected to remain high during pandemic travel restrictions. With CHOH, the Trust must ensure additional project needs at LH28 and LH49 are programmed for funding/implementation.
- *Canal Community Days:* Continue to streamline Canal Community Days activities towards the greatest return on investment. Conduct cleanup and beautification projects in small, independently functioning groups, including individual initiatives, rather than large concentrated groups.
- *Canal Stewards:* Fund the continuation of a Canal Stewards Coordinator past 12/31/2021 or absorb the program into the general Program Team's duties. Strengthen the Stewards as a team and as individuals, and continue to recruit more, expanding the program in all four counties in the park. Begin to lay the groundwork for expanding the program to align more closely with the Trust's mission and goals.
- *Canal Towns Partnership (CTP):* Continue to support the CTP as a fiscal agent. Apply for a third AmeriCorps VISTA intern to begin in June 2022.
- *Canal Ambassadors Program:* Research and decide whether we have the capacity to develop this new program in order to expand Trust outreach with the use of more fully trained volunteers. It is possible this would be the major Trust assignment for a half-time VISTA intern.

- *Canal For All*: Continue to cultivate authentic partnerships with neighboring communities and partners through program opportunities. Work to make the C&O Canal Trust a more equitable and inclusive organization by soliciting community participation in setting organizational objectives.
  1. *Work with the board to create and staff a DEI Advisory Committee. In FY20, the board passed a DEI resolution, committing to exploring an Advisory Committee as well as broadening and deepening diversity, equity and inclusion for Trust and Park staff, volunteers, visitors, donors, and board members.*
  2. *Continue to apply for funding for the CJC program and the Coordinator position, from Montgomery County and other sources. Received a third year of \$19,000 from Montgomery County for FY22.*
- *Volunteers*: Take lessons from CHOH volunteer issues and use them to further strengthen the Trust’s volunteer engagement throughout all programs. Align all volunteer programs with DO-7/RM-7.
- Things listed in year four of the Canal Trust strategic plan which cannot occur without additional resources/capacity:
  1. Hire a full-time Program and Volunteer Coordinator, and other part-time, contract, and/or intern positions as possible. Adjust position descriptions as needed to more fully support the entire Program Team’s staff, goals, and capacities.
  2. Finish the five-year towpath resurfacing plan through support from NPS and the Maryland’s Transportation Alternatives Program.
  3. Expand virtual access to the Canal Quarters lockhouses through the Plan Your Visit app.
  4. Work with the board in developing a Diversity, Equity and Inclusion (DEI) Advisory Committee

*Note*: This FY21 Programs Operating Plan covers work to be accomplished by the Programs and Partnerships department. Actions relating to a number of initiatives and strategies noted in the Trust’s Strategic Plan are not covered within the Programs Operating Plan because this work is covered by other departments and will appear in those departmental plans. For example, Canal Classrooms fundraising efforts will be noted in Development Operating Plan.

## **Protect, Preserve, Restore**

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.*
    - a. Continue cyclic maintenance of all Canal Quarters buildings and develop cyclic maintenance tracking system.
    - b. Host annual building inspections with NPS.
    - c. Utilize partnerships, volunteers, and contractors to supplement staff in addressing urgent and high priority items identified in inspections.
    - d. Work with CHOH to ensure roof replacement for LH28 and LH49, and repointing and whitewashing LH21 are prioritized and funded by the Park.
  - b. Maintain the Canal Quarters program by laying supportive groundwork for the continuation of the program through the coronavirus pandemic and any other economic fallout that may occur.
    - a. Continue implementing flexible action plan in response to the threat of coronavirus spread and people’s changing needs around it.
      1. *Retain third-party cleaning company to clean lockhouses between guest stays.*

- 2. *Determine whether it's feasible to raise booking rates rather than simply asking for donations to help cover the increased cleaning costs.*
  - b. Enhance existing business plan for Canal Quarters, anticipating a possible subsequent decrease in CQ bookings when long-distance travel becomes safe again.
  - c. *Preserve and maintain Park structures through community volunteer support.*
    - a. Identify and complete preservation projects as part of Canal Community Days and Canal For All activities.
  - 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)*
    - a. If prioritized by CHOH and funding sources are identified, conduct grassroots advocacy campaign to support CHOH's efforts.
  - e. *Respond to urgent Park needs due to natural disasters.*
    - a. Prepare Lockhouses 6, 21, 22, and 25 for future floods.
    - b. Actions will be weather dependent.
- 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.*
    - a. Support fundraising efforts by ensuring program participants receive information on funding priorities and that outreach events include opportunities to give on site.
  - b. *Advocate for government funding for towpath surface improvements.*
    - a. Conduct grassroots advocacy campaign to support CHOH's Transportation Alternatives Program grant proposal.
    - b. Maintain accurate advocacy contacts database.

## **Enhance the Visitor Experience**

- 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.*
    - a. Absorb the Canal Stewards program into general Program Team operations and continue to expand it.
      - i. Strengthen the connection between the Stewards and the Trust and with each other, creating work days and social events for Stewards to gather safely, as health concerns allow.
    - b. Host Canal Community Days events as safety and capacity allow.
      - i. Host as many public Canal Community Days events as is feasible, focusing on operating as a collection of small groups rather than large, concentrated ones, complying with all local and Park health and safety requirements.
        - 1. Continue the extended Canal Community Days “season” into fall to accommodate more groups.
      - ii. Provide individuals and families with the opportunities to remove trash from the Park separately from the group Canal Community Days events.
      - iii. Offer and host private cleanup events as much as is feasible, complying with all local and Park health and safety requirements.
    - c. As funding and CHOH capacity and desire allows, fund Eagle Scout projects and other areas.

- d. Support funding for a rare plant survey in the Park's Billy Goat trail system, to be conducted by a one-year botany fellow, in advance of rehabilitation of the trail system.
  - e. Take reasonable steps towards compliance with National Park Service's Director's Order 7 on Volunteer Programs.
    - i. Review Training documents and enhanced onboarding documents for Quartermasters
- a. *Place donor-sponsored benches in the Park for the comfort of visitors.*
- 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. *If capacity allows, develop the Canal Ambassador program. Hire VISTA intern to develop this program. This intern would focus half their time on the Canal Ambassador Program and half on the Canal Towns Partnership.*
    - a. *Determine whether focusing on Canal Ambassadors or Canal For All would be a better use of a VISTA's time.*
  - c. *If capacity allows, develop and incorporate new content into trip planning tools.*
- 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.*
    - a. Refine baseline quartermaster training requirements; develop and conduct annual training/orientation.
    - b. Take additional reasonable steps towards compliance with National Park Service's Director's Order 7 on Volunteer Programs and prioritize actions which improve the volunteer experience.
  - b. *Promote the Canal Quarters program.*
    - a. Support Communications team in implementation of marketing plan.
- 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.*
    - a. Perform fiscal agency duties as needed.
    - b. Supervise and mentor VISTA intern working for Canal Towns Partnership. VISTA's work plan and projects include conducting needs assessments in Towns and developing communications content.
    - c. Apply for VISTA internship to support CTP work. If intern is hired, scope (with Canal Towns Partnership) and manage work of intern.

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

- 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.”*
    - a. Craft Canal Community Days events, Canal Stewards activities, Canal Quarters open houses, and Canal For All in-Park engagement events for maximum visibility and public engagement, as health concerns allow. Ensure program participants receive information on funding priorities and that outreach events include opportunities to give onsite.
  - c. *Host community-building events that bring together different Park constituencies.*
    - a. As prioritized within other goals, host Canal Community Days events, Canal Stewards work days and “coffees,” Canal Quarters open houses, and Canal For All in-Park engagement events as capacity and safety allow.
  - d. *Build relationships with Park partners by capitalizing on mission overlap.*
    - a. Ensure partners are informed and involved in Canal Trust programming. Look for opportunities to partner in mutually beneficial ways.
  - e. *Coordinate efforts with national advocacy groups.*
    - a. Actions will be dependent on individual campaigns or needs.
2. *Engage the next generation of Park stewards.*
- a. *Provide vital financial support for Canal Classrooms*
    - a. Support fundraising efforts by ensuring program participants receive information on funding priorities and that outreach events include opportunities to give on site.
  - b. *Engage youth volunteers.*
    - a. Prioritize youth volunteer engagement through Canal Community Days.
  - c. *Provide employment opportunities for youth and young professionals.*
    - a. Provide full year employment opportunity for one youth through Chesapeake Conservation Corps.
      - i. *Apply in December 2021.*
    - b. Provide jobs skills training opportunities for youth from traditionally underrepresented backgrounds.
      - i. PeaceJam and Montgomery County’s TeenWorks programs are planning to engage in fall programs, focusing especially on environmental stewardship, ecology, and career-related topics for their young adult programs.
    - c. Apply for youth/young professional VISTA intern.
    - d. Provide paid contract opportunities via Task Agreements with CHOH.
      - i. *Find out if the park is able to extend the Task Agreement a few more months or absorb the program into the general Program Team’s duties.*
  - d. *Engage young professionals as volunteers, donors, and advocates.*
    - a. Prioritize young professional engagement through Canal Community Days.
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. *Continue to grow the Canal Stewards program.*
    - a. Find out whether the park can extend the Task Agreement to fund a Canal Stewards Coordinator a little longer, or absorb this program into the general Program Team duties.
    - b. Recruit new individuals and groups as Stewards. Strengthen the connection between Stewards and the Trust and with each other, creating work days and social events for Stewards to gather safely, as health concerns allow.

- b. *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.*
  - c. *Create a framework for the Canal Towns Partnership to support the Park through advocacy, volunteerism, and financial contributions.*
    - a. Leverage the strength of the Canal Towns Partnership to advocate for Park projects.
    - b. Support the Canal Towns Partnership in implementation of their strategic plan.
  - d. *Enable the business community to support the Park through volunteer service projects and financial support of park stewardship projects.*
    - a. Host fee-based Corporate Stewardship Canal Community Days events as capacity allows.
    - b. Review Corporate Stewardship process and policies and adjust wording as needed, asking for the stewardship donation rather than implying it's a choice.
    - c. Engage local businesses and business communities to become Canal Stewards.
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.*
    - a. As capacity and safety allow, provide communities traditionally underrepresented at the Park with opportunities to Play, Learn, Serve, and Work.
    - b. Foster existing partnerships with community groups through program engagement and cultivate new partnerships. Seek opportunities to deepen partnerships through shared resources and goals.
    - c. Expand program to reach new partners in Montgomery and Washington Counties, and Washington, D.C.
    - d. Discuss whether to engage 2-3 community advisors reflective of the communities the program seeks to partner with, in order to better approach and reach these communities.
  - b. *Diversify Canal Trust volunteer force.*
    - a. Prioritize engagement of traditionally underrepresented groups in Canal Community Days activities.
    - b. Prioritize recruitment of quartermasters and volunteer project leaders.

### **Achieve Operational Excellence**

- 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.*
    - a. Ensure program direction and goals align with CHOH direction and goals. Ensure strong communication between Trust programs and applicable CHOH divisions, especially as new CHOH staff are hired into key positions.
  - 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. *Protect cash reserves sufficient to fund as much of Canal Quarters' operating expenses as possible, given decreased revenue during FY21 and increased expenses.*

- a. Assessment on Canal Quarters fees to determine the efficacy of increasing them versus simply inviting guests to donate money to offset cleaning costs and other added expenses due to the coronavirus pandemic.
  - b. *Set attainable annual budgets that incorporate growth and appropriately reflect the philanthropic capacity of our donor base.*
    - a. Create program budgets and projections for use in organizational budget.
  - c. *Improve positive cash flow to accommodate seasonal and programmatic revenue and expense fluctuations.*
    - a. Track program revenue and expense schedule to support cash flow planning.
  - 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.*
    - a. Support cultivation plans for major donors with program interest.
  - c. *Produce effective fundraising events that engage current and potential donors through the efficient use of resources.*
    - a. Support [Park After Dark] with volunteers.
  - 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.*
    - a. Advocate for Montgomery County and Washington County grants directly supporting Trust programs and operations.
  - i. *Grow event and program sponsorships in terms of numbers, revenue, and geographic reach.*
    - a. Support development team in determining program sponsor prospects and requesting financial support.
- 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.*
    - a. Support branding efforts by ensuring program participants receive on-brand information and that outreach events include branded information.
  - b. *Adapt materials and website content to incorporate branding strategies.*
  - c. *Create engaging content for print, digital, video, and mobile platforms.*
    - a. Support Communications team in content development by passing along story leads and ensuring programs are photographed.
  - 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.*
    - a. Assess skill set needed within Program Committee and recruit new talent as necessary.

- b. Host quarterly Program Committee meetings.
    - c. Develop a Diversity, Equity, and Inclusion advisory committee based on the recommendations of the resolution passed by the board in FY20.
  - 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.*
    - a. Implement HR policies for Program Staff.
  - d. *Create a desirable workplace for current and future employees.*
    - a. Research and develop recommendations for building a more inclusive workplace.
    - b. Partner with the CHOH Coordination Team to assess and improve DEI-related practices with regards to staff, volunteers, visitors, partners and contractors in the park.
  - e. *Grow and align Trust staff resources to effectively address priorities.*
    - a. If VISTA intern funded, hire and train VISTA intern.
    - b. Recruit and hire Chesapeake Conservation Corps member for FY22.
    - c. Assess program staffing needs to achieve long term Strategic Plan goals.
      - 1. Hire a full-time Program and Volunteer Coordinator, and other part-time, contract, and/or intern positions as possible.
6. *Improve business practices to enhance efficiencies.*
- a. *Review and adjust policies, procedures, and processes.*
    - a. Review and adjust Volunteer Program to comply with NPS RM-7.
    - b. Review and adjust Canal Quarters policies to maximize profits without resulting in occupancy decrease.
      - i. Maintain a flexible business plan that can be updated in rapidly changing times as health and safety requirements, visitor needs, and the economy shift.
      - ii. Begin to lay the groundwork for the eventual rehabilitation of 1-2 more full-amenity lockhouses.
    - c. Research and develop recommendations for equitable and inclusive business practices.
  - b. *Upgrade technology to enhance staff efficiency.*