



# Strategic Plan

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2015–2019

*“To accomplish great things, we must not only act  
but also dream. Not only plan but also believe.”*

—ANATOLE FRANCE

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# Summary

## **Current Environment (External)**

- The reach and understanding of heritage interpretation is increasing and becoming more recognized – nationally and internationally
- Visitors to interpretive sites are demanding greater access and desire for technology in programs and media
- Substantial growth in global tourism is putting pressure on natural and cultural sites impacting management, visitor experience, and sustainability negatively
- Heritage interpretation programs in US colleges and universities are decreasing along with published research on heritage interpretation
- Nationally, association membership trends show declines, as pressure is applied to provide relevant products and services in return for loyalty

## **Key Strategic Issues (Internal)**

- Development of a more sustainable, financially secure and innovative organization is needed
- Demands for advocacy for both the field of heritage interpretation and the value of heritage interpreters require action
- Growth, engagement, support, and retention of members require additional focus
- Partnership and collaboration opportunities need to be explored for member and organizational benefit

## Strategic Themes

By the end of 2016

*A. Ensure organizational viability*



By the end of 2017

*B. Review, develop, and grow the performance of NAI's core programs and services*



By the end of 2019

*C. Partner nationally and globally; engage in collaborative advocacy efforts*



## Strategies

- Review Board Member/Organizational Unit leader roles and responsibilities, and strengthen leadership management and operational procedures, to reduce inefficiencies, sharpen focus, and strategically allocate internal resources
- Ensure financial sustainability, mission impact, and organizational accountability
- Assess and promote effective technology, communication and collaboration among Board, workgroups, membership, and staff
- Reach out to past leaders, foster continued organizational commitment, and elicit engagement with ongoing organizational leadership and development programs
- Develop and implement an internal volunteer and leadership development program
- Foster and support volunteer and leadership development opportunities within NAI
- Undertake a full certification and national standards review
- Complete a competitive analysis, and innovative conference strategy
- Undertake a member and market needs assessment for training
- Complete a comprehensive demographic survey of NAI members
- Finish Organizational Unit re-organization, management and member service stabilization
- Staff and board to work collaboratively with Organizational Units to develop annual operations plans to support NAI strategic plan and annual goals
- Develop and implement membership growth and retention initiatives
- Develop stronger relationships across the organization particularly with Organizational Units to realize the potential of "One NAI"
- Develop an advocacy policy and strategy
- Implement a national collaborative and strategic partnership assessment and plan
- Develop international outreach, collaboration, mentoring, exchange programs, and partnership plan to work with international members and similar organizations
- Initiate discussion and work to develop an International Federation of Heritage Interpretation Organizations between key international heritage interpretation organizations

# The Essence of NAI

## Mission

Inspire leadership and excellence to advance heritage interpretation as a profession

## Vision

NAI is the leader of interpretation in the United States and an irreplaceable partner to other interpretive associations around the world

## Goals

- High engagement with members resulting in retention and growth
- Well respected training and professional development programs for all levels of paid and unpaid interpreters
- Innovative and member responsive programming
- Access and support of tools and research that can influence and provide direction for heritage interpretation into the future
- Through advocacy, heritage interpretation is more widely respected and supported as a profession in North America and NAI is its preferred voice
- Collaboration and partnerships with agencies and organizations nationally and internationally
- Energetic, high performing, well-rewarded staff
- Excellence in ethical and transparent governance
- Effective and transparent communications

## Strategic Framework

*The National Association for Interpretation will:*

Facilitate and provide access to the latest research, training, resources, and trends in heritage interpretation through multiple channels while advocating for and creating networking and mentoring opportunities to grow its member numbers, and celebrating their achievements

*For:*

All individuals, agencies, organizations, and companies that provide personal and non-personal heritage interpretation

*As a:*

Preferred voice and advocate for heritage interpretation nationally, and as a trusted mentor and collaborator internationally.

# NAI Now

*NAI supports, trains, certifies, and provides professional networking to paid and unpaid interpreters in the US and Canada. Members in 36 countries participate in collaborative conferences held around the world and look to NAI as a mentor and leader for interpretive organizations.*

With the amalgamation of the Western Interpreters Association and the Association of Interpretive Naturalists in 1988, NAI became one voice dedicated to the single focus of heritage interpretation in the US and has maintained that role successfully for the last 25 years.

Headquartered in Fort Collins, Colorado – NAI has six full time staff dedicated to the primary programs of the organization, and it's members. Two part-time staff and student volunteers bolster its capabilities.

With time and a growing membership, NAI formed 10 distinct geographical regions representing all 50 states and the 10 provinces that make up Canada. Affinity-based sections developed to provide members the opportunity to network and learn skills within a specific niche. Recently, changes to the bylaws created a new title and structure for regions and sections. Now known as “Organizational Units” – regional and affinity-based sections operate under guidance of an “Advisory Council.” Membership grew to around 5200 in 2006 and has remained at that plateau. The addition of six certification programs from 2000 to 2003 continued to provide professional growth and a steady influx of new interpreters through the highly successful Certified Interpretive Guide Program. Additionally, Organizational Units provide localized and specialized training opportunities through regional workshops, and increasingly webinars. Nationally, heritage interpretation receives additional support, advocacy and development in many other organizations and entities, many of which are specifically focused. Examples of this include the North American Association for Environmental Education, the American Association for State and Local History, the Nature Center Directors Association, and others. Many of NAI's members belong to these organizations in addition to NAI.

Members also continue to become more diverse – culturally as well as in the settings for their work. The traditional interpretive field of the federal and state agencies have been joined by local historic and living history sites, tourism operators, theme parks, convention and visitor bureaus, national and local museums, musicians, poets and indeed anyone with a story to tell with the goal of connecting people to a cultural, historical or natural resource. Supporting the stories is research from academia and industry, and the vast talents of commercial members, trainers, and consultants that bring interpretive ideas to life in many forms of interpretive media. New opportunities and niches in heritage interpretation, training, and professional development allow interpreters and their organizations to expand and become diluted at the same time which creates pressure and ambiguity on limited resources within the profession. A concerning issue facing NAI and membership is the failure to retain members, particularly after certification.

National conferences, held every year since 1988, and an international conference, added in 2006 provide the opportunity for NAI to share its collective knowledge and networking to peers working in the field in addition to numerous countries around the world. Several of those countries have brought to life their own interpretive organizations and continue to collaborate with NAI opening up new frontiers and potential to increase the value of interpretation on a global scale.

In 2013, NAI held assets of \$1.38 million and an annual income of \$1.23 million. Primary funds come from membership dues and certification. While NAI is not a wealthy organization, and relies annually on a line of credit when needed, solvency is balanced through the ownership and increasing value of its Fort Collins office property.

# Who We Are and Will Become

## Strategic Framework

### *Service to our members*

#### *NAI will:*

- Train for professional development and to improve skills
- Certify to confirm skills
- Network to share skills and improve community
- Demonstrate excellence
- Encourage research to further respond to changing needs, and to understand
- Advocate to increase awareness
- Collaborate and partner to mentor, support, and grow both ourselves and organizations and agencies who support and contribute to the practice of interpretation

### *Furthering the interpretive profession*

#### *For:*

All individuals, agencies, organizations and companies who provide and support personal or non-personal interpretation, or who can use interpretive communication techniques and methodologies in their roles

### *Development of the Organization*

#### *While being:*

- Mission oriented
- Innovative
- Relevant
- Sustainable
- Financially viable

# Why

With all the past success that NAI has enjoyed over the years, the organization has reached a plateau in its evolution. Previous strategic plan objectives have been reached through the hard work and commitment of staff, board members, task forces and general members and the time for innovation, creativity, and looking forward are again at the forefront.

Member and visitor profiles and needs are changing with evolving generations, trends, and technology. Heritage interpretation programming is more diverse, and ever shrinking budgets means those tasked with managing the visitor experience through interpretation are looking for new ideas and opportunities. The sharp increase in global travel and tourism, and the desire for unique and meaningful visitor experiences is placing unprecedented pressure on both natural and cultural sites, providing a unique opportunity and role for heritage interpretation.

Anecdotal evidence suggests that nationally, interpretive staff and budgets are constantly under pressure and threatened with elimination highlighting the need for increased advocacy for the interpretive profession at all levels, and especially to those in control of larger budgets who may not necessarily understand the benefits of heritage interpretation. NAI must be an innovative force in ensuring relevancy of the profession.

Internationally, interpretation as a professional field is enjoying increasing value and understanding. A number of organizations directly supporting the field have grown or have been borne in a number of countries, regions and continents. Partnerships and collaborations with some of these organizations have provided much needed networking, idea sharing, joint research opportunities at the university level, and multi-national work opportunities in the private sector. NAI is enjoying both increased visibility internationally, and the opportunity to explore increased collaboration.

## Professional Membership Organization Trends

Professional membership organization trends over the last 5-10 years show that professionals in many fields now have more choices than ever in how they network, find tools and resources to enhance their work and careers, and how they access it. Professional organization membership itself is declining throughout the US, and organizations are being forced to find alternative ways to engage the profession, retain members and grow revenue streams. Research, member needs assessments, and data driven analyses are being routinely used by successful organizations to drive strategy, growth and evolution in a changing association world.

The millennial generation is seeking greater meaning in their professions, and in the activities and organizations that they support. With the deep belief that they can change the world, millennials are mission-focused and will participate in “engaged action” if they believe in the cause.

Competition means that organizations must identify and grow within their niche and culture in order to grow their membership. Competition also provides opportunities for shared collaboration, growth and networking. In order to find value in dues, members are looking for key benefits in joining and added value. Missing the trends and failing to adapt is being met with increasingly harsh consequences. Diversity and inclusion are no longer something to work towards, but must be integrated into every facet of a successful organization.

To that end, NAI’s Organizational Units – represented by regions and sections - have an increased desire, opportunity, and need to be more innovative, participatory, and valuable to members. Through recent bylaw changes, now have the mechanisms to do so. NAI is in a unique position to identify and work towards creating the vibrant and sustainable heritage interpretation field of the future, and must take advantage of that opportunity. A collaborative and “One NAI” working together can and will make a difference.



# Focus Areas

*Four focus areas have been identified within NAI to ensure that the full scope of interpretation and the organization are being addressed in each and every program or product developed or offered.*

## **Focus on Heritage Interpretation**

Heritage Interpretation is a respected, researched, and peer-reviewed social science. From its philosophical and practical roots, to benefits and outcomes, NAI is focused on advancing interpretation as a profession, a social science, and as Freeman Tilden wrote – an art. Interpretation is fully inclusive of our natural and cultural heritage and all aspects of interpretive programming and development including design, planning, fabrication and implementation. Focusing on “Interpretation” looks at the profession, its legacy, research, advancement, advocacy, training, and philosophy.

## **Focus on Heritage Interpreters**

Heritage Interpreters and the legacy they steward are the glue that bonds NAI together as an organization and defines its purpose. From an entry-level front-line interpreter to national director level interpretive administration and oversight, NAI would not exist without the people who identify as “heritage interpreters.” The focus on interpreters includes both paid and unpaid professionals, the roles they play in their organizations, and the professional ethics, standards and required skills associated with performing heritage interpretation.

## **Focus on Membership and Organizational Units**

Members are the primary resource of NAI and as such drive all of the programs and services that ensure it continues to operate. Organizational Units – both regional and affinity-based sections provide opportunities for members to gather or share ideas locally, regionally, or in amongst interest-based networks. Focusing on membership and organizational units ensures collaborative efforts between all aspects of the organization (“One NAI”) are able to provide a reason for members to continue to belong, and that the right opportunities are available for those members to interact with the organization in the way they prefer.

## **Focus on Organizational Viability**

Board participation, governance, bylaws, fiduciary responsibility, and organization development are all key terms that any organization must be sure to address, plan for, and evolve with to ensure stability and viability. Focusing on organizational viability provides NAI with a set of priorities that allow it to function, be collaborative, competitive, and innovative, to grow, and operate within non-profit legal requirements.

# Strategic Imperatives or Themes

*From the four focus areas, strategic imperatives provide a desired outcome statement for each, from which all priorities and objectives support.*

## *Heritage Interpretation*

Communicate, advocate, celebrate, and demonstrate the value of heritage interpretation

## *Heritage Interpreters*

Empower both paid and unpaid heritage interpreters across the full arc of their careers

## *Membership and Organizational Units (“One NAI”)*

Engage members and empower organizational units to create vital communities and supportive networks

## *Organizational Viability*

Ensure a well-led, professionally managed, financially sound, and responsive organization

# Derived, Key Strategic Issues

*Opportunities and threats, and strengths and weaknesses (SWOT analysis) are summarized below in groups, and from them are derived the key strategic issues facing NAI.*

## **Opportunities and threats, strengths and weaknesses**

*Principal opportunities and threats for interpretation (external)*

- Heritage interpretation is becoming a more recognized term and field both nationally and globally
- At a broad academic level, more research is being done that informs the field of heritage interpretation as a whole
- Degree programs supporting the interpretive field are declining
- Budgets are being stressed within many national and international organizations leading to programs being eliminated or primarily driven by non-personal media
- A perception continues that heritage interpretation primarily occurs at, and NAI members primarily come from natural resource based sites and not historical sites, museums, or commercial operations
- Advocacy to maintain heritage interpretation's relevance and role in historical preservation, nature conservation and tourism is much needed nationally and internationally
- Advocacy is needed for the role heritage interpreters play in engagement, empowerment, civic society, community development and tourism
- As online courses and training become more accessible through technology, the reach and value of interpretive communication training is moving beyond traditional niches
- The internet, smart phones and other interactive devices are changing the way we plan visits and interact with interpretation – both cultural and natural
- On-site technology – its impact on traditional media and interpreters
- Increased global tourism demand and the search for enriched visitor experiences provides multiple opportunities for heritage interpretation to play a larger role
- Both at once competition, and thus an opportunity - providing national and international workshops that include interpretation are increasing in other organizations and those for which heritage interpretation is a niche (e.g., American Association for State and Local History, The International Eco-tourism Society, National American Association for Environmental Educators, American Alliance of Museums)

## **Key strategic issues for NAI**

1. Advocacy is needed in the field of heritage interpretation in order to secure its importance and growth
2. Training and certification are in high demand as well as being key revenue drivers for the organization and should be managed for maximum success for NAI and its trainees
3. Increased partnerships and collaboration will provide a platform for increased national and international growth
4. Research that benefits heritage interpretation needs to be identified, supported, and disseminated by NAI and made more easily available to the field

## Opportunities and threats, strengths and weaknesses

*Opportunities and threats in addressing the needs of members and heritage interpretation employers (external)*

- Opportunity to develop and grow shared tools and resources for access by interpreters at all levels
- Members desire greater access to potential job opportunities through NAI
- Develop expanded opportunities for ongoing career development and support – especially for mid to full career professionals
- Non-traditional audiences from outside of the heritage interpretation field are beginning to show up at NAI training courses
- There is increased demand for mentoring and professional development opportunities for career interpreters at all levels
- Declining interest, participation and understanding of some certification categories such as Heritage Interpreter, Interpretive Host, and Interpretive Manager
- Trends show that Millennials are less inclined to join member organizations.
- Engagement strategies are becoming increasingly different for different generations
- Better engage new members or newly certified interpreters at all levels to increase their involvement with the organization
- More employers increasingly increasingly faced with decreasing budgets for interpretive programs and staff with multiple negative results
- Inability to fund, or access to free or reduced cost trainings offered by other organizations or institutions is providing increased competition to NAI offerings
- Becoming irrelevant as other organizations fulfill needs currently provided by NAI

## Key strategic issues for NAI

1. Increased demand for NAI to facilitate retention or increase of funding for access to training, conferences and positions across many organizations and agencies
2. Membership retention and engagement are trending low
3. Many members are nearing retirement and their legacy and knowledge may be lost
4. Millennials and the next upcoming generation need a different approach and have different desired outcomes and priorities for training and engagement
5. Professional development at all levels is a key priority and driver for participation, training and career development in interpretation across all sectors
6. Both a member assessment and employer needs assessment are needed to provide data for strategy development that could benefit the growth of the profession

## Opportunities and threats, strengths and weaknesses

### *Strengths and weaknesses of NAI for its role (internal)*

- National and International Workshops have successfully been offered annually since their inception either as a standalone event, or in partnership with other organizations providing networking opportunities and access to shared resources at an international level
- The CIG, CIT, and CIP Certification programs have become successful and drive key revenue streams, however, they have not been revisited or reviewed since their inception
- While NAI is a recognized body for heritage interpretation in the US, there is increased competition from other organizations and lack of awareness of by “interpreters” who are doing the work
- Revenue sources are inconsistent from year to year making it difficult to budget accurately and funds for development of new programs and services is extremely limited
- International Workshops have inconsistently been able to demonstrate a profit
- Staff capacity is limited
- Academic research related to heritage interpretation is not as well promoted by NAI as it could be nor accessible to the people or sites who could best utilize the data, findings, and recommendations
- NAI has a strong history of volunteers fulfilling various roles within the governance and event planning arenas. Some members actively work towards or seek leadership opportunities within Organizational Units or at the organizational level but it is not consistent
- Regional and affinity-based Organizational Units offer multiple opportunities to engage with other members through newsletters, websites, local gatherings and training opportunities however it is not consistent
- Some long time agencies/partners have “moved away” from NAI in recent years and support from key agencies is limited
- Lack of clear work goals and opportunities for development and training for staff to develop new or increased skills

### Key strategic issues for NAI

1. Positions and roles within the staff need to undergo review for efficiency and development potential
2. Workshops – both national and international should continue to be reviewed for future potential and new strategies to drive satisfaction and increased attendance
3. Certification reviews to identify viable “certification” versus “certificate” classes around robust national standards and legal requirements is overdue
4. Organizational relationships between Board, staff and Organizational Units need focused development and growth to ensure future success
5. An increased focus on partnerships and collaboration is needed with key strategic national organizations and partners
6. Leadership development, training, and succession planning is needed for board, Organizational Unit leadership, staff, and support positions across NAI

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### Opportunities and threats, strengths and weaknesses

#### *Strengths and weaknesses of NAI for its role (internal)*

- Difficulty in recruiting volunteers for key roles placing greater stress on staff in some areas, impacting work schedules and budgeting
- Failure of multiple Organizational Units – both interest-based, and regional
- Staff are committed to more strongly supporting Organizational Units to ensure their success but are limited by time and resources
- No roadmap exists to allow for Organizational Unit and staff to best utilize resources and opportunities to drive and achieve goals
- Lack of vision, skills and volunteers to foster local meetings and members, or to fulfill other services as identified by several Organizational Units creating disparity in services
- Current budgets do not have room for additional or new spending
- Current income does not support ability to pay off debts annually, or provide development fund
- Lack of well-established communications procedures can put staff and Board members in awkward position creating mistrust
- Inconsistent past accounting practices and financial management
- Maintaining programs due to “passion” over practicality
- High travel costs that are not always supported by income
- Federal (and other) budgets are diminishing
- Limited board development opportunities, and performance is not measured
- Fundraising and investment development is limited in its success

### Key strategic issues for NAI

7. Stabilization and growth of income and expenditure is reaching critical stage
8. Organizational Units need to work to further develop key strengths and successes where feasible. Ensuring adherence to the bylaws for functional units to allow innovation and growth needs to occur
9. Increased the diversity of NAI’s membership and leadership needed to ensure a fully inclusive and representative organization
10. Increased focus on development opportunities and grants required

# Strategic Themes

The first theme is about viability, the second is about delivering key programs, and the third is about sustainability of the profession both locally and globally. Actions to implement strategies can begin on day one, irrespective of intended completion dates.

*Key strategic issues are consolidated into three strategic themes and supporting strategic objectives.*

ISSUE	THEME	STRATEGIC OBJECTIVES
<ul style="list-style-type: none"> <li>• Advocacy</li> <li>• Training and certification</li> <li>• Partnerships and collaboration</li> <li>• Research</li> <li>• Membership retention</li> <li>• Professional development</li> <li>• NAI staff</li> <li>• National and international workshops</li> <li>• Organizational relationships</li> <li>• Leadership development</li> <li>• Finances</li> <li>• Investment and development</li> <li>• Employer and member needs</li> <li>• Diversity</li> </ul>	<p><b>A. Ensure organizational viability</b>  <i>Two years to complete (by the end of 2016)</i></p>	<ul style="list-style-type: none"> <li>• Review Board Member/Organizational Unit leader roles and responsibilities, and strengthen leadership management and operational procedures, to reduce inefficiencies, sharpen focus, and strategically allocate internal resources</li> <li>• Ensure financial sustainability, mission impact, and organizational accountability</li> <li>• Assess and promote effective technology, communication and collaboration among Board, workgroups, membership, and staff</li> <li>• Reach out to past leaders, foster continued organizational commitment, and elicit engagement with current NAI leadership and development programs</li> <li>• Develop and implement an internal organizational volunteer and leadership development program</li> </ul>
	<p><b>B. Review, develop, and grow the performance of NAI's core programs and services</b>  <i>Three years to complete (by the end of 2017)</i></p>	<ul style="list-style-type: none"> <li>• Initiate full certification and national standards review</li> <li>• Develop a competitive analysis and innovative conference strategy</li> <li>• Undertake a member and market needs assessment for training</li> <li>• Undertake a comprehensive demographic survey of interpreters</li> <li>• Finish Organizational Unit re-organization, management and member service stabilization</li> <li>• Staff and Board to work with Organizational Units to develop annual operations plans to support NAI Strategic Plan, and annual goals</li> <li>• Develop and implement membership growth and retention initiatives</li> </ul>
	<p><b>C. Partner nationally and globally; engage in collaborative advocacy efforts</b>  <i>Five years to complete (by the end of 2019)</i></p>	<ul style="list-style-type: none"> <li>• Develop stronger relationships across the organization particularly with Organizational Units to realize the potential of "One NAI"</li> <li>• Develop national advocacy policy and strategy</li> <li>• Develop a national collaborative and strategic partnership assessment and plan</li> <li>• Develop international outreach, mentoring and partnership plan</li> <li>• Initiate discussion and work to develop an International Federation of Heritage Interpretation Organizations between key international heritage interpretation organizations</li> </ul>

# Strategies and Performance Indicators

## *Theme A: Ensure organizational viability; by end of 2016*

### Strategy

### Performance Indicator

A.1 Revisit the NAI definition of “Heritage Interpretation” to ensure relevancy for the future of the profession

1. Initiate a task force to perform an in-depth analysis of the current definition of “heritage interpretation” and if needed, propose a new definition for consideration and approval

A.2 Develop and implement an internal volunteer/leadership development program to ensure long term viability of leadership within NAI

1. Identify a task force on leadership development within the organization
2. A leadership development plan is developed that identifies skills and traits desired by the organization and a timeline for implementation
3. Progress is measured annually after inception of the plan to ensure goals are being met, and any gaps identified

A.3 Develop and implement long term communications, public relations and development strategies and plans inclusive of members and the wider public

1. Identify strategies for effective communications, public relations and development
2. Complete communication, public relations and development plans and implement

A.4 Ensure financial sustainability, mission impact, and organizational accountability

1. Long-term financial goals are established and a strategy to achieve them identified
2. A mission-impact exercise and matrix is undertaken at the end of every year to check against assumptions and to inform decision making for the following year
3. An internal accountability audit is developed and measured against every year to identify strengths and opportunities

A.5 Assess and promote effective technology, communication and collaboration among Board, workgroups and staff

1. An assessment of communication needs, methods and delivery is undertaken along with a gap assessment
2. Recommendations are made that identify communication tools and methods that will increase the level of communication, acknowledgement and participation between Board, workgroups and staff



A.6 Review Board Member/Organizational Unit leader roles and responsibilities, and strengthen leadership management and operational procedures, to reduce inefficiencies, sharpen focus, and strategically allocate internal resources

1. Review all Executive Committee and standing committee roles and responsibilities to ensure strategic alignment and effective allocation of resources to best serve the organization and members
2. Annual reviews are completed of board member/organizational unit leader skills, expertise, and desired contributions. Each member is assigned to relevant working groups or projects using the findings
3. Board member/organizational unit leader service plans with timelines and measurable objectives have been facilitated and completed, providing evaluative feedback and coaching support as needed
4. Board member/organizational unit leaders training opportunities are provided increasing awareness of roles and responsibilities and facilitating the accomplishment of service plans
5. Every board member/organizational unit leader can pinpoint 3-5 ways that they have contributed to the NAI vision and strategic initiatives on an annual basis

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A.7 Reach out to past leaders and award winners to foster continued organizational commitment, and elicit engagement

1. A task force is convened to identify past leaders and a program developed to re-engage them with NAI
2. Create a mechanism that provides the opportunity to participate, influence, and help key programs

*Theme B: Review, develop and grow the performance of NAI's core programs and services; by end of 2017*

**Strategy**

**Performance Indicator**

B.1 Undertake a full certification and national standards peer review

1. A task force is established to undertake certification and national standards peer review
2. All certification programs have been assessed against current literature and standards are based on this

B.2 Complete competitive analysis and innovative conference strategy to ensure long term viability and adaptation to changing trends and needs

1. A taskforce will be initiated to research emerging trends in conference development, management, and programing
2. Present recommendations using the above research, trends analysis, and post-conference surveys

B.3 Undertake a member and market needs assessment for training and development

1. A professional needs assessment has been completed for the North American audience
2. Identify and provide training opportunities that support and build knowledge, skills and abilities required to reach the minimum competencies and standards of the professional certification categories

B.4 Complete a comprehensive demographic survey of interpreters to ensure all members have access to relevant services and information that meets their needs

1. A task force will be initiated to develop a demographic survey tool that will allow NAI to better understand its national and international members and needs.
2. Results from the demographic survey will be laid against current programs and services to identify any gaps or opportunities
3. Recommendations will be made offering opportunities for NAI to close any gaps identified

B.5 Foster and support unpaid professional and leadership development opportunities within the heritage interpretation field as a whole

1. Initiate a task force of key interpretive leaders representative of NAI's member organizations and business types
2. Survey and analyze leadership needs and gaps within the profession
3. Review current NAI programs and certification to identify opportunities and challenges
4. Develop and implement a professional leadership development program based on findings and regularly assess effectiveness

B.6 Complete Organizational Unit re-organization, management initiatives and member service stabilization

1. Organizational Units will have documentation on file, accepted by the Board, recognizing member services, and an annual review process by the end of 2015
  2. A collaborative task force comprising members from Organizational Units, staff, and Board will be developed to explore strategic plan goals and opportunities
  3. Recommendations and ideas will be presented and if viable with potential positive mission impact, assigned champions to develop, budget and implement
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B.7 Staff, Board and Organizational Units collaborate to develop annual operations plans to support NAI Strategic Plan and annual goals

1. Organizational Units will have annually approved operations plans demonstrating alignment with operational goals and strategic opportunities
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B.8 Develop and implement membership growth and retention initiatives

1. A membership taskforce working with the Executive Director and Membership manager has been initiated
2. Annual membership goals for retention and new members will be identified, and strategies defined and implemented to meet annual goals

## *Theme C: Partner nationally and globally; engage in collaborative advocacy efforts; by end of 2019*

### **Strategy**

C.1 Develop stronger relationships across the organization, particularly with Organizational Units to realize the potential of “One NAI”

### **Performance Indicator**

1. A taskforce inclusive of Organizational Unit leaders, staff, and board members is established to explore stronger collaboration, opportunities, and outcomes for Organizational Units that will benefit the organization as a whole
2. Organizational Unit annual operations plans include programs and products that meet strategic plan goals
3. The national annual operations plan includes programs and products in collaboration with Organizational Units

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C.2 Develop a national advocacy policy and strategy

1. An advocacy taskforce is initiated to define desired advocacy levels and an advocacy policy for NAI
2. An advocacy strategy/plan is developed and has been adopted by NAI and is in use, and regularly reviewed and updated

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C.3 Complete a national collaborative and strategic partnership assessment and plan

1. An assessment and external partnership plan has been completed and is regularly updated
2. Key national partners have been identified, and any potential outputs are assessed regularly against mission impact and desired strategic outcomes

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C.4 Develop international outreach, mentoring and partnership plan to work with international members and similar organizations

1. International needs advancing the profession are identified and discussions convened on common issues
2. A clearinghouse of resources to respond to needs is created
3. As opportunities and products are identified, a taskforce or team will be assigned to develop, propose, and implement any resulting offering
4. From the list and resources, those which could be better served by a larger federation have been identified

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C.5 Lead discussion and work to initiate International Federation of Heritage Interpretation Organizations between key international heritage interpretation organizations

1. A taskforce and a timeline to work on federation project has been initiated
2. Key global partner organizations have been identified and contact established
3. Discussions with international group regarding convening an International Federation of Heritage Interpretation Organizations has been initiated
4. An International Federation is established, or international cooperative agreement reached on any established outcomes

# Glossary

## Advocacy

The term “advocacy” has many applications. As NAI has played a limited advocacy role in the past – the term is used loosely in this document until a new advocacy policy and strategy is more fully developed as part of an overall goal of the strategic plan.

## Heritage Interpretation

“Heritage” represents both the natural AND cultural heritage that all those who work in interpretation work to interpret every day. “Nature Interpretation” or “Cultural Interpretation” are also correct and represent more specialized forms of interpretation as a whole.

## National

This term is used to be fully inclusive of all local, regional, city, and other entities unless otherwise specified.

## Organizational Unit

Under the 2010 updated bylaws, Organizational Units (OU’s) is the legal term identifying what NAI more commonly calls “Regions” and “Sections.” While these terms can be used interchangeably in this plan, the term “Organizational Unit” has been primarily used.

## Task Force

A working group that can be comprised of staff, members, board, or outside expertise as approved by the President for a specific task for a specified period of time

## Unpaid Professional

An updated and more respectful term for “volunteer” – unpaid professional pays a higher respect to the professional skills and talents of the thousands of docents and unpaid interpreters that work supporting interpretation.

## Sources

- NAI National Conference Attendees - Reno 2013
- Facebook comments and responses to specific questions
- LinkedIn comments and articles
- NAI Strategic Planning Webpage comments
- Academics in interpretive field interviewed by Masters Students from Stephen F. Austin University
- Personal communications of staff, board, and task force members with individual members or professionals in the interpretive field
- Board Strategic Planning meetings

## Thank You!

As chair of the strategic planning task force, I would like to extend my sincere gratitude to board members, NAI staff members, and the members of the task force including Chuck Lennox, Jessica Moore, Kevin Damstra, John Miller, Todd Bridgewater, Theresa Coble, Linda Strand, Amy Lethbridge, John Luzader, Paul Caputo, Emily Jacobs and Margo Carlock who put in many hours listening, writing, editing and researching for this plan. Thank you also to the many members and Organizational Units who provided thoughtful and meaningful feedback to help guide the future of YOUR organization. It has become very obvious and gratifying to know that many of us feel passionately about our profession and the efforts needed to ensure a strong legacy. Please know that if your thoughts and comments are not directly represented in this plan – they have not been forgotten or ignored. A strategic plan is only the guiding first steps and identification of destinations on a journey. The actual roadmap, directions and the sites we explore along the way will also include your richness, experience, and ideas as NAI reaches into the future. With next steps and implementation about to begin, we hope you will continue to join in and be heard!

—Jane Beattie, November 2014

