

Lasting Legacies are a Top Priority of the Montana Strategy

The Bicentennial Commemoration, while important, is a short-term experience. Its opportunities and impacts must be guided to complement the long-term goals, values and needs of Montana communities. These issues combine to form a rich and complex context for the Montana Bicentennial Strategy. It is clear that Montanans do not see the Commemoration as simply a tourism program. Other priorities must be addressed, including historic preservation, education, American Indian perspective, cross-cultural communication, public safety, resource management and community development. In all facets of the Commemoration, the opportunity to leave lasting legacies will be treated as a top priority.

This chapter defines both the context for, and the components of, the Montana Bicentennial Strategy. The context is expressed in three dimensions:

- ◆ Guiding Principles
- ◆ Strategic Goals
- ◆ Program and Project Criteria

The Montana Bicentennial Strategy is presented in its five key components:

- ◆ Strategic Framework
- ◆ (Emphasis on) Long-Term Benefits
- ◆ Organization and Roles (for Management and Implementation)
- ◆ Three-tiered System of Strategic Programming (details in Chapter IV)
- ◆ Travel Corridors (Chapter V)
- ◆ Promotion System (Chapter VI)

This chapter explains the strategic framework for the Master Plan, the emphasis on long-term benefits, key partner organizations and their roles, and a three-tiered system of strategic programming. Chapter IV provides details about the Tier I program of essential projects and events. Chapter V explains a proposed system of travel corridors to organize Bicentennial programming and promotion. Chapter VI outlines a general marketing strategy and promotion elements for the Commemoration.

Chapter III: **The Montana Bicentennial Strategy**

- ❖ Guiding Principles
- ❖ Strategic Goals
- ❖ Proposal Criteria
- ❖ Strategic Framework
- ❖ Organization/Roles
- ❖ 3-Tiered System

Pompeys Pillar



Mission of the Montana Lewis & Clark Bicentennial Commission

"In commemoration of the Bicentennial of the Lewis & Clark Expedition of 1803-1806, it shall be the mission of the Montana Lewis & Clark Bicentennial Commission to be the officially recognized leader in planning and coordinating observance of the Bicentennial in Montana.

The Montana Lewis & Clark Bicentennial Commission shall provide statewide focus, direction and oversight, while facilitating the effective delivery of technical guidance and assistance to communities, groups, and individuals.

The Commission will focus on public education, coordinating events, the promotion of historical and cultural awareness and sensitivity, recognition of American Indian involvement, and responsible stewardship for the natural and cultural resources along the route of the Expedition.



Guiding Principles Will Protect the Bicentennial's Integrity

Human imagination is rich and unpredictable. In every facet of the Commemoration, there will be people who come forward with diverse ideas on how to support, complement and exploit it. Without guiding principles or explicit values, activities could quickly become conflicting, undesirable or hurtful.

Understanding this potential for problems, the Montana Lewis & Clark Bicentennial Commission established a set of guiding principles, summarized below, for Commission actions in preparing for Bicentennial programs and events. These principles were embraced in the strategic planning process as well.

- ◆ Highest ethical standards
- ◆ Historical and cultural accuracy in interpretation and preservation programs
- ◆ Responsible stewardship, including consideration of potential social and environmental Bicentennial impacts
- ◆ A Commission endorsement process that supports only high quality projects and events
- ◆ Objectivity in evaluating program and event proposals
- ◆ Emphasis on education in programs and events
- ◆ Fiscal responsibility in seeking and managing Bicentennial funds
- ◆ Partnerships and collaboration across all sectors
- ◆ Broad public participation – all perspectives are welcome and sought

Strategic Goals Address Key Facets of Bicentennial Preparation

The Commission also adopted a set of Bicentennial goals. These, too, serve to guide strategic planning.

Goal A: Promote public awareness and provide leadership and coordination in the planning, development, marketing and presentation of state, regional and national Lewis & Clark Bicentennial activities among Indian nations, public agencies, communities and private sector organizations and individuals.

Goal B: Coordinate, promote and serve as a principle leader in all educational endeavors regarding the Lewis & Clark Expedition.

Goal C: Create Montana Lewis & Clark Bicentennial legacies which will serve to educate, inform and entertain both residents and nonresidents for years beyond 2006.

Goal D: Operate within a well-defined organizational structure that emphasizes fiscal responsibility and centralized technical expertise.

Specific Commission objectives under each of these goals also were considered in preparation of the Master Plan.

Commission Has Criteria to Evaluate Project Proposals

In late 1999, the Bicentennial Commission was asked by the National Council and Congress to prepare a list of endorsed projects for possible funding at the federal level. The Commission solicited project nominations from communities, organizations and tribes for this purpose. In anticipation of the many nominations it was to receive, the Commission established a set of criteria for evaluation and prioritization of each candidate project. All projects were subsequently reviewed using the same objective process. The criteria are (in abbreviated format):

- ◆ Sustains/enhances local infrastructure
- ◆ Enhances/protects Lewis & Clark historic, natural or cultural resources
- ◆ Leaves a lasting legacy
- ◆ Ensures historical accuracy and cultural inclusiveness, especially respect for the American Indian perspective
- ◆ Provides high educational value regarding the Lewis & Clark experience
- ◆ Has potential to generate interest and attract a wide range of visitors
- ◆ Represents surmountable challenges, realistic budget and funding prospects
- ◆ Demonstrates local, agency, and/or tribal support as appropriate
- ◆ Has direct relationship to the Lewis & Clark story in Montana; enhances visitor experience

These criteria are well suited for consideration of the relative merits of individual projects (the goal of the original evaluation). However, as part of strategic programming, additional criteria were needed to evaluate projects for the overall Montana Bicentennial program. With assistance from the planning team, the Commission adopted two sets of complementary priorities. The first focuses on

The Commission will regularly solicit and evaluate new Bicentennial project proposals.

enhancing the *system* of Lewis & Clark-oriented features (i.e., the supply side of the economic equation). The second focuses on the Bicentennial *markets* in terms of the mix, range and visibility of attractions (i.e., the demand side of the equation). These two sets are:

“Supply” Factors:

- ◆ Enhances major Lewis & Clark sites and key gateways (improves the asset)
- ◆ Enhances geographic distribution of Bicentennial activities (benefits as much of the state as possible)
- ◆ Accessible activity and sites (taps key highways, airports or rail)
- ◆ Proximity to major destinations (builds collective strength and taps nearby markets)
- ◆ Presence of supporting amenities (comfortable)
- ◆ Long-term community benefit (provides a lasting legacy)
- ◆ Doesn’t overwhelm local capacity (works within local holding capacity)

“Demand” Factors:

- ◆ Match with target markets (addresses significant resident and visitor segments)
- ◆ FUN! (provides entertainment value)
- ◆ Potential for private sector support (fundable beyond government budgets)
- ◆ Adds breadth to product mix (expands potential to increase visitor length of stay)
- ◆ Contributes significantly to state and national Commemoration (improves the system)
- ◆ Marketable statewide/nationally (attractive to sponsors and media)

With these criteria, goals and guiding principles as context, strategic planning for the Montana Bicentennial became uniquely Montanan, as the Commission intended.



Honor Guard Members
Preparing for a Black Powder
Salute

Master Plan Has a Five-Point Strategic Framework

Participants in the planning process emphasized the need for a five-point strategic framework. Each point needs to be linked to, informed by, and complementary to the others. These dimensions (see Figure 3.1) include:

1. **Historic Preservation:** This goes beyond the preservation of physical places. It includes written and oral history, traditions, culture, and (where feasible) the protection of the natural environment (or context) surrounding places of historical importance. Further, a great legacy the Bicentennial can leave behind is a deeper appreciation for the rest of Montana's history. American Indian, mining, agriculture, ranching, trapping, forestry, and other facets of regional history have the opportunity to be highlighted. It is important for people to know about Montana's heritage, so they can appreciate its citizens' values, ways of life and natural resource-based economies. From this perspective, every industry, every community and every culture in Montana will benefit from the telling of their stories.
2. **Education and Communication:** Educational opportunities abound for residents and visitors alike. From school curricula to site interpretation, projects can be refined to contribute substantially to learning among people of all ages and backgrounds. Methods for communicating Bicentennial messages range from the Internet to brochures, from workshops to radio broadcasts, from videos to story telling. One of the greatest opportunities will be the enhancement of regional cooperation. As communities and tribes collaborate to address Bicentennial challenges, improved communication will encourage cooperation on other issues. Perhaps no greater legacy could be conceived than this. Creativity and variety will be strongly encouraged in these related fields of education and communication.
3. **Community Development:** For the Commemoration to be successful, communities must be ready to host visitors. Improvements to downtowns, entryways, restrooms, parks, roads, and public safety systems are among the many community-oriented projects that will sustain the Bicentennial. These same improvements will become some of the key legacies expected of the Commemoration.



Figure 3.1. Five Point Strategic Framework

4. **Business Development:** Montana’s business community stands to benefit substantially from the millions of additional visitors to the state. At the same time, the private sector must be ready to meet the demands of these guests. Adjustments will be needed in everything from motel rooms to retail inventories, from hospitality training to convenience. Systematic programs to improve such business facets will be a major priority.
5. **Resource Management:** Visitation at parks, campgrounds, Lewis & Clark sites, natural areas, scenic byways and other destinations will be heavier than ever before. Resource managers will need additional staffing, improved amenities, adequate access and means to protect the very assets being visited.

All endorsed Bicentennial projects must fall within one or more of these five dimensions. In addition, such projects must address Bicentennial goals, principles and criteria. Each program, project, event or investment in the Montana Strategy has been carefully evaluated to ensure that these standards are met.

The Montana Bicentennial Commission is ideally suited to act as the central facilitator for programming and collaborations between participants in the five dimensions. The Commission’s executive director will play a pivotal role in strengthening the implied and intended partnerships. Toward this end, an advisory team of specialists, as described in the next section, will be created to support the director.

In brief, the strategic framework has been organized to ensure three things (see Figure 3.2). First, a comprehensive system – the strategic framework – will be put in place to sustain a successful Bicentennial experience for both Montanans and visitors. Second, lasting legacies in each of the five strategic dimensions will extend the Bicentennial benefits well into the future. Third, the overall quality of life for Montana’s people will be improved through Bicentennial programming.

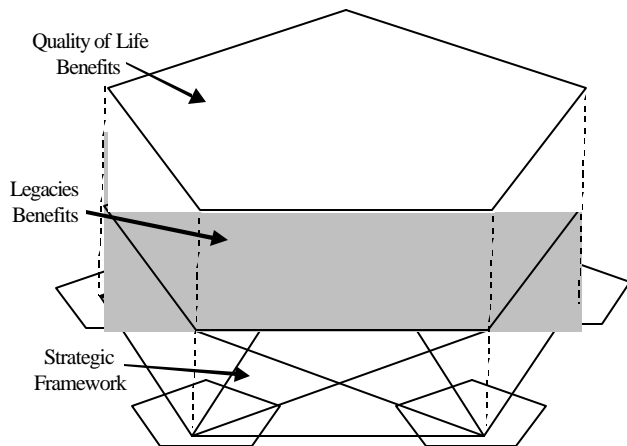


Figure 3.2. The Strategic Framework and Its Residual

Key Organizations Have Important Roles in the Commemoration

A thorough analysis of organizational development opportunities was beyond the scope of this Master Plan. However, several general observations and recommendations are presented in this section, based on the planning team's experience with participants during the planning process.

Preparation for the Bicentennial is under way by a wide range of local, regional, state, tribal and federal organizations. There is consistent cooperation among these entities. However, their missions and origins are diverse. To some degree, their participation in various facets of Bicentennial preparation is coincidental. For these reasons, they do not operate as a formal team. As a result, there are gaps and overlaps in some of their functions. Many of these inefficiencies could be eliminated via minor refinements in their roles and collaboration.

There are eight entities in Montana with substantial programming related to the Bicentennial. These are:

1. Montana Lewis & Clark Bicentennial Commission: created by the State's legislature and administratively attached to the Montana Historical Society; membership appointed by the Governor. Director and assistant work for the Commission – the lead state agency for the Bicentennial. The Society also plans to hire a state Lewis & Clark historian to provide research and guidance to groups around the state as they seek to accurately implement Bicentennial programming (interpretation, education, traveling trunks, events, etc.).
2. Regional Bicentennial Commissions: 15 such organizations, generally created by county governments; membership appointed by County Commissioners.
3. Chapters of the Lewis & Clark Trail Heritage Foundation: 9 chapters, self-organized with volunteer membership.
4. Travel Montana: a division of the Montana Department of Commerce, staffed by professional state employees.
5. Montana Historical Society: a state agency for the preservation and protection of Montana's history.

*...the party all of whom
except Capt C. being
still firm in the belief that
the N fork was the
Missouri and that which
we out to take; they said
very cheerfully that they
were ready to follow us
anywhere we thought
proper to direct..."*

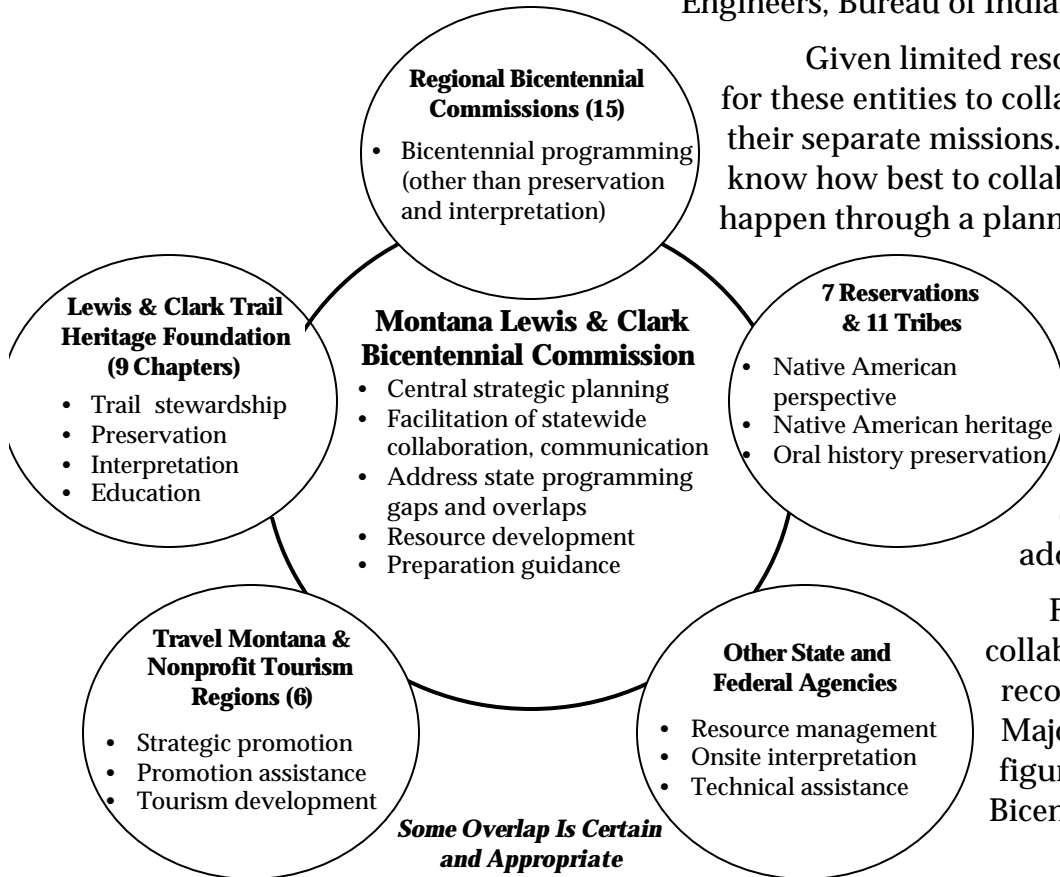
– Meriwether Lewis, June 9, 1805

6. **Regional Tourism Organizations:** a system of promotion-oriented nonprofit corporations organized into six tourism regions, or "countries."
7. **Tribal Lewis & Clark Bicentennial Committees:** appointed by tribal leadership; organization varies among the seven reservations and eleven tribes. All of the reservations are members of the Montana Tribal Tourism Alliance, an organization that also might be engaged as a partner.
8. **Other State and Federal Agencies:** these are either resource management organizations with some responsibility for the Lewis & Clark Trail/sites, or technical assistance programs that expect to assist various efforts in Bicentennial preparation. Agencies include Montana State Parks, USDA Forest Service, Bureau of Land Management, National Park Service, Bureau of Reclamation, Corps of Engineers, Bureau of Indian Affairs and US Fish & Wildlife Service.

Given limited resources for the Bicentennial, it is essential to seek means for these entities to collaborate as efficiently as possible while still addressing their separate missions. In particular, the Bicentennial Commission needs to know how best to collaborate with and support each of the others. This can only happen through a planning process that engages each group closely.

It is important to note that even within each entity type (for example, Regional Bicentennial Commissions), organization and mission may vary across the state. Consequently, any new organizational system will almost certainly continue to have some gaps and overlaps. The key, however, is that a more formal collaborative system will be better able to succeed in addressing the Bicentennial.

Figure 3.3 outlines recommendations for improving collaboration among the seven key partners. These recommendations generally involve only minor adjustments. Major changes in mission or focus are not required. The figure emphasizes the central coordinating role of the Bicentennial Commission.



The Executive Director of the Commission will be the focal point for this coordinating effort.



In particular, the Director will be most valuable in the areas of:

- ◆ Resource development
- ◆ Educational programming for planning groups
- ◆ Communication between and among all entities
- ◆ Interface with the National Bicentennial Council
- ◆ Coordination of planning with neighboring states
- ◆ Champion for the Montana Bicentennial program nationally
- ◆ Coordination of Master Plan implementation

Figure 3.3 also clarifies that the system is not hierarchical, with any one entity reporting directly to another. The orientation is toward collaboration, efficient communication and partnership. At the same time, traditional roles are encouraged. The nine chapters of the Trail Heritage Foundation will continue to focus on Trail stewardship and preservation.

The Regional Bicentennial Commissions will emphasize programming, especially events, local promotion, assistance to Foundation chapters and specific

Jefferson River

Bicentennial projects. (Two chapters, Crimson Bluff and Marias River, also serve as Regional Bicentennial Commissions.) Reservations and tribes will target communication of American Indian perspectives, heritage and preservation of oral history. Travel Montana will lead in promotional efforts at the state and national levels.

The fifteen Regional Bicentennial Commissions represent a major opportunity for systematic, statewide collaboration. However, these Commissions vary significantly in their organization and roles. The Bicentennial communication system could work much more effectively if each Commission possessed:

- ◆ Official recognition by county commissioners
- ◆ A board of directors
- ◆ Commitment to send one representative to each State Commission meeting
- ◆ Designated primary contact person for the State Bicentennial Director
- ◆ Commitment to communicate messages from the Commission to the local area
- ◆ A regional Bicentennial plan (prioritized projects, budget, work plan, etc.)

With the system in Figure 3.3 as a framework for discussion, the seven entity types should meet soon and regularly until they have refined the set of roles and responsibilities each will accept in preparing for the Bicentennial. The team should consider addressing at least seven goals:

Collaboration will be the Key to Successful Bicentennial Preparation

1. Expanded communication (in both directions) between the Commission and the other entities
2. Expanded communication between each of the other entities
3. More complementary programming among entities
4. Clear scopes of work

5. Clarification of gaps and overlaps
6. Stronger partnerships
7. Common commitment to the statewide strategy

Even the most successful collaborations will not address all open issues. For example, it is likely that preservation activities will be undertaken by groups other than the Heritage Foundation chapters; events may be organized by groups other than Regional Bicentennial Commissions. However, in general, the roles recommended above appear to be best suited for the entities noted. Where gaps or awkward overlaps remain, the Bicentennial Commission should take the lead in addressing them.

Master Plan Defines 3-Tiered System of Strategic Programming

The Montana Bicentennial Strategy calls for creation of a seamless, three-tiered system of Bicentennial programming (see Figure 3.4). The tier orientation prioritizes programming, and recognizes that Bicentennial activities exist within a world of limited resources.

Tier I: The most critical projects and sites are organized in the first tier . These form the basic framework for a successful Bicentennial Commemoration. In short, these projects and sites are the essentials – where most resources will be focused initially. The first tier includes:

- ◆ Projects and sites of statewide and national significance
- ◆ A set of additional strategic, integrated projects
- ◆ Projects and events which represent quality in each dimension of the Lewis & Clark Bicentennial experience

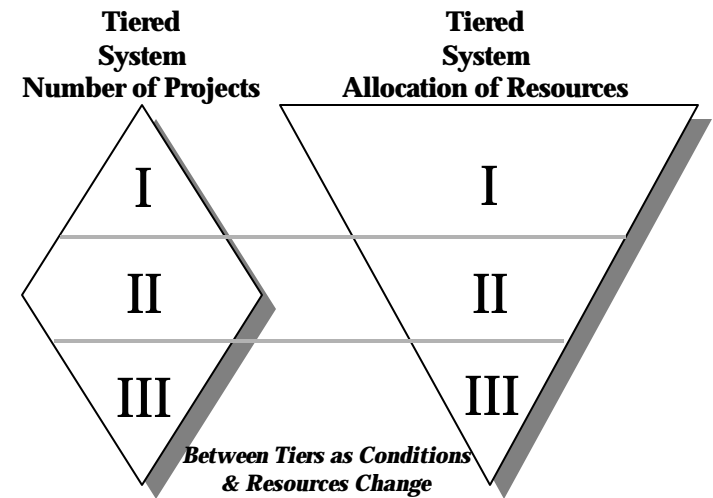
Tier II: While first tier projects are critical, success of other local and regional activities is important as well. The Commission recognizes that technical assistance from its staff and other professional resources are needed to ensure this principle. Therefore, the Commission’s Executive Director will build an assistance team to provide:

- ◆ Technical assistance system for local and regional preparation
- ◆ Both proactive and responsive assistance programming
- ◆ Assistance in resource acquisition, especially identification of funding

The assistance team will include staff from the Department of Commerce/Travel Montana, Small Business Development Centers, universities, other state and federal agencies and private businesses. Entities in Figure 3.3, communities and other organizations will be encouraged to work with the Commission’s technical assistance team to address their various needs. However, to receive assistance, applicants must be willing to adhere to the guiding principles established by the Commission. It is possible that in the process of working with Tier II partners, Commission representatives may identify projects that become candidates for Tier I status. Should this happen, the Commission will review the project and decide on the matter. The essential requirement is that the project must be of such outstanding quality that it will contribute substantially to the statewide Bicentennial program.

Tier III: The tiered system was developed with the recognition that many valuable projects are yet to be conceived or planned. The third tier (Tier III) includes initiative from the Commission to encourage additional high quality programming. The intent is to move newly identified projects which are important to the state system into one of the two other tiers for further support.

Figure 3.4 depicts that, while the number of Tier I and Tier III projects will be fewer than Tier II, the majority of resources (at least initially) will be focused on Tier I. The next chapter (Chapter IV) describes the Tier I program (sites, projects, events). Further details of both Tier I and Tier II projects are found in Appendices A and B. As describe above, Tier III represents projects or events not yet conceived.



Tier I: Seamless Statewide L&C System

- ◆ Strategic, integrated set of projects
- ◆ Focus: projects of statewide significance
- ◆ Quality in each dimension of L&C experience
- ◆ Majority of resources devoted here

Tier II: Support System for Local Projects

- ◆ Technical assistance
- ◆ Resource acquisition assistance (funding)

Tier III: System for Later Ideas

- ◆ Technical assistance
- ◆ Move to 1st or 2nd Tier

Figure 3.4. 3-Tiered System

