

*Heidi Spivey*

## Lewis & Clark Memoirs

I have always been interested in history. My father was in the Air Force and until he retired in 1968, we had moved numerous times. What was absent from my childhood, in terms of "roots", was abundantly surpassed in exposure to different communities and environments. In the late 1950's we lived in Virginia where we made frequent outings to the tremendous historic sites of the area. Jamestown, Williamsburg, Monticello, Manassas and others, were all common destinations for the family.

My direct involvement with Lewis & Clark began as a result of accepting a position in 1991 with the Jackson County (Missouri) Parks & Recreation department, in charge of county owned historic sites. One of my responsibilities was Fort Osage National Historic Landmark. The fort was a contemporary (1950s) partial reconstruction of a military garrison and civilian trading outpost. The fort had been established by William Clark in 1808. Clark had identified the location as being ideal for a fort in June 1804 as the Lewis & Clark Expedition ascended the Missouri River. I believe I became a member of the Foundation in the mid 1990s.

In the mid 1990s interest was being generated by the upcoming bicentennial. Stephen Ambrose's *Undaunted Courage*, published in 1996, served as a catalyst to local and national groups. In early 1997 representatives from regional historic sites and tourism organizations started to meet informally to discuss possible regional bicentennial activities. Dick Williams, trail manager for the Lewis & Clark National Historic Trail, at that time based out of Madison, Wisconsin, began a series of visits. He encouraged individual sites and the community to begin planning for the bicentennial. My association with the Lewis & Clark National Historic Trail became more formal when Fort Osage was designated as a certified site. Fort Osage had previously been designated as a certified site of the Santa Fe National Historic Trail.

It was also in 1996 that I met Glenn Bishop and his Expedition of Discovery Group from St. Charles. Fort Osage hosted the group in April during their trip up the Missouri. The community responded very positively to the Discovery Group.

Initial inquiries about forming a local chapter of the Lewis & Clark Trail Heritage Foundation evolved into a series of meetings of interested local parties. Ron Laycock made several trips to Kansas City representing the Foundation. Ultimately, the Missouri/Kansas River Bend Chapter was formed in late 1998 or early 1999. I became a board member of the chapter and was elected vice-president. The chapter applied for and received its 501c3 tax exempt status.

Interest in Missouri at a statewide level was also increasing. The Missouri Historical Society, Missouri Department of Natural Resources and Missouri Department of Conservation were assuming leadership positions. Missouri Governor Mel Carnahan established The Missouri Lewis & Clark Bicentennial Commission in 1998. The commission was primarily composed of appointed "commissioners" representing academic and tourism interests. The commission also mandated strong participation of

all applicable state agencies, including the Missouri National Guard.. The Missouri Legislature made a one time appropriation to the commission for infrastructure and a grant pool to assist local projects. Jonathan Kemper, a Kansas City banker, and Donald Gallop, a St. Louis attorney, were appointed co-chairs. Mr. Gallop resigned because of health reason in late 2001 and was replaced by Bob Archibald, Missouri Historical Society. The commission remained active and useful during the entire bicentennial.

I first attended a LCTHF annual meeting in 1999 held in Bismarck. It was an exciting time. Sammie Meadows was the executive director and the National Council of the Lewis & Clark Bicentennial had recently spun off of the Foundation. Michelle Bussard was the executive director, Dave Borlaug was president of both the Foundation and Council. The Council was working on establishing the signature events and were soliciting applications from communities. Kansas City was exploring the possibility submitting an application. Kansas City was also being considered as a site for the Council's annual planning meeting. My recollections of the meeting, being a first time attendee, were positive. I remember how energetic people were, a pervasive sense of optimism and a genuine sense of being welcome. Although not active in the Foundation at a national level in 1999 or 2000, I was very active with the local chapter and beginning to become more active with the Missouri Commission . It was also during this period that the early plans for the Fort Osage Education Center were developed. The Kansas City area planning for a signature event began to gel. People from the entire region were recruited to participate. Our area of "inclusion" began to include communities from Lexington, Missouri to St. Joseph, Missouri as well as communities in Kansas such as Leavenworth, Atchison and Kansas City, Kansas.

It was during the 2000 meeting in Dillon, Montana, that Patti Thomson approached me and asked if I would become more active and asked if I might serve on a committee. I declined at the time. To me, Dillon possibly represented the ultimate Lewis & Clark meeting. Against the backdrop of forest fires, bus rides, a delightful campus and the stunning beauty of Montana, I began to feel a mental connection to the Foundation and what it represented. Back in Kansas City, I was the president of the local chapter and continued planning the Education Center. Jackson County made a presentation to the Missouri Commission in December of 2000 outlining Fort Osage Education Center, the Commission selected it as the highest state priority.

Prior to the 2001 annual meeting in Pierre, South Dakota, Patti Thomson again contacted me and asked if I would consider serving on the Board of Directors. Having a better "feel" of local, state and national interest in Lewis & Clark I felt that perhaps I might be able to contribute to the Foundation. I agreed to serve if elected by the members.

I arrived in Pierre prior to the board meeting and was invited to sit in. Carie Karnes was now the executive director, Jane Henley was the incoming president. The Foundation was growing in stature and staff. A budgetary crisis was looming with the .com melt down affecting investment funds. The existing board members were extremely friendly, spoke freely and appeared to have a diverse background. I also sensed that the organization was suffering from growing pains. I also felt some concerns about governance and accountability. The Foundation had been in existence for over 30 years, primarily as a large social group who was passionate about the history of the expedition.

Its members had been ranchers, teachers, businessmen, lawyers and housewives. With the approaching bicentennial and national visibility, federal representatives, publishers and congressmen were courting the organization. I believe the board and staff were unprepared to adequately respond.

I was asked to be on the marketing committee. The purpose of the committee was largely undefined and I felt that it was largely non-productive. The year between the Pierre and Louisville meeting was one on major changes, all affecting the Lewis & Clark community. An individual on the finance committee had "cashed out" the Foundation's investment portfolio when the stock market bottomed out. This action demonstrated the board's lack of fundamental internal control and lapses in proper governance. Kari Karnes resigned as executive director leaving an opening at a critical juncture. Fortunately, Carol Bronson was recruited to assume the position of executive director. Additionally, similar governance and control issues were manifested with the resignation of Michelle Bussard of the Bicentennial Council. The Council was essentially bankrupt, ostensibly because of lack of diligent oversight by its board of directors.

The Louisville meeting represented a national event on the verge of crisis. The Missouri Historical Society had assumed basic management of the Council with Bob Archibald commanding a critical leadership role. The National Park Service had taken an ever increasing dominant role in helping shape the bicentennial. Through the Lewis & Clark National Historic Trail division and their Challenge Cost Share program, the Council, Foundation, Foundation Chapters and numerous communities were increasing dependent upon the Park Service. The Council, since its inception, had understood the importance of including Native Americans in the bicentennial. Even with financial assistance, Native American participation remained fluid. Concurrent with developments with the Council and Foundation, the role of the NPS was also being defined and enlarged. The LCNHT office had been moved from Madison to the Omaha regional office. Gerard Baker had been brought in as superintendent and additional staff was being assigned. A preliminary planning session with Gerard and his staff had been held at Fort Osage in which a master plan for Corps II, 200 Years to the Future was developed. The bicentennial had become a national event, literally encompassing the entire country. Against a barrage of hype, serious challenges needed to be addressed. Major issues included coordination of roles, funding, Native American participation and egos. While almost always at the table, the Foundation seemed to navigate a path of minimal controversy. The pivotal decision of establishing the Council as a separate entity was central to the somewhat blemish free appearance of the Foundation. It was at the Louisville meeting that I was elected to the position of vice-president. It was at this point I started to participate in the monthly executive committee conference call. Participants included Larry Epstein (president), Ron Laycock (president-elect) myself, Jane Henley (immediate past president), Jane Weber (secretary) Steve Lee (treasurer) and Carol Bronson (executive director). My recollection was that Steve was frequently unable to participate because of work schedules. Another concern was that the conference calls were in the evening, requiring Carol to use her "own time". From recollection, major concerns of the executive committee (EC) centered on how the Foundation would participate in the upcoming signature events. The most immediate being the kick off event at Monticello in January 2003. A general sense of guarded optimism prevailed. New members were coming in, the Foundation had received substantial grant money from the NPS and

advertising in *We Proceed On* was increasing. Monticello was important to the bicentennial, the Foundation and Council.

I believe the Foundation, learned and grew at this first signature event. The weather was bitterly cold. The primary venue was a half day program on the lawn of Monticello. Although warming tents were available, the program was probably too long. Larry Epstein's remarks, representing the Foundation were brief, but eloquent. Most of the people speaking would soon end up as "regulars" on the signature event circuit and many other Lewis & Clark events. Although Native Americans were represented on the dais, protest banners were also present. Most of the attendees (myself included) had direct links to, and a vested interest in, Lewis & Clark. It was an exciting time, full of possibility. In retrospect, it was not unlike holding a Mass in the Vatican and then marvel at how many people attended. Even at this point, although early in the bicentennial, I don't believe that a visceral connection was being made with the general public. The Foundation's sponsoring of a musical production did not come anywhere near meeting expected participation (and revenue). The Foundation sponsoring of the reception, although well attended, probably was too costly. Again most of the attendees were government employees. Issues concerning the Council, federal participation and Native American involvement were looming. A significant setback announced at the event was Mike Oliver's return to the Forest Service after spending several years as a special congressional liaison for the bicentennial. Mike's knowledge of legislation and federal agencies were invaluable to the Foundation and bicentennial.

From a governance perspective, I believe that several areas of weakness were appearing in the Foundation. The most pressing was that of finances and the role of the treasurer. With increasing money coming to the Foundation, much of it federal, a review of the Foundation's accounting and budget systems indicated action was necessary. Because of Treasurer's Steve Lee's job, he was not able to devote sufficient time to the Foundation to overhaul the budgetary process. I came to believe that the board of directors, as a whole, did not fully appreciate the role and responsibility of board membership, accountability and transparency. This is not a criticism of individual board members. The entire board was dedicated to the Foundation, each possessing unique talents. The organization they now headed was quite different from the one when most were elected to the board. Another issue was the manner in which board members were identified and elected. The by-laws required board members to be elected by the general membership with the officers then elected by the board. However, traditionally the board members were nominated by the nomination committee without a real opportunity for general member input. At the annual meeting, board nominees were presented to those attending the business meeting and a voice or ballot vote held. Usually less than 20% of total membership attended the annual meeting with many of those electing not to attend the business meeting. Other long range concerns also were surfacing, primarily what role the Foundation might have after the bicentennial and depending on that role, how would the money be generated to support the mission. The demographics of members was also becoming important – we were an organization of older, middle class people who seemed quite content with armchair scholarship and the status quo. Ron Laycock would soon be assuming the presidency, and his challenges were many.

In April 2003 I acted as chairperson of the local host committee for the Council's annual planning meeting in Kansas City working closely with Michelle Bussard and the Council. Even though not a member of the council (I would later become ex-officio) I had begun to sense some of the internal issues which would plague the Council. The vision of the Council was beginning to become solidified, the leadership necessary to attain that vision remained problematic. Ego issues would again surface. A retired Army general who was to be a prominent guest speaker left soon after arrival, supposedly upset at his position on the dais for the following day's ceremony. It was at this meeting that a large bronze statue of Lewis & Clark was dedicated. Funded by the private William Kemper Foundation, the Eugene Daub bronze remains one of the significant art legacies of the bicentennial.

The 2003 Meeting in Philadelphia was an interesting experiment. The local chapter did an outstanding chapter in presenting a diverse, content filled meeting. Headquartered in the Omni Hotel, an upscale downtown high-rise, the members were treated to many scholarly sessions. Absent, however, were the multiple bus excursions to "country sites" which I think many people believe are a prerequisite of an annual meeting. Replacing the day-long jaunts were shorter trips to the American Philosophical Society and other sites of interest. The Foundation also faced a crisis when the Omni requested compensation for unused hotel rooms which had been guaranteed at the time of the signing of the contract, several years prior to the meeting. Carol Bronson successfully negotiated with the Omni to eliminate liability. The role of the Foundation, and its level of representation at the upcoming signature events was still contested. It was at this annual meeting where Chuck Holland came on the board as treasurer. Chuck's knowledge of accounting practices, investments and not-for-profit budgeting would have a significant, positive effect on the Foundation. The Foundation would rapidly be transformed from a somewhat antiquated, "receipts in shoebox" organization, to a financially transparent, IRS compliant organization. At times it would prove to be a turbulent journey. It was at this meeting that I became president-elect and Jim Gramentine became vice-president.

An ongoing discussion, at times contentious, centered on what official presence the Foundation would have at each of the Signature Events. It was generally agreed that it would be best to have the executive director, some staff and a booth present at all events, the implementation would be expensive. What many believed would be a direct payback, either with resale merchandise or selling of memberships, were not realized when a strong Foundation presence was made. The Signature Events, themselves, were at times inconsistent, many being adversely affected by inclement weather or lack of strong public participation or lapses by the organizing committees. In communities where there was a strong local chapter, the chapter often took the lead in representing the Foundation. Ron Laycock represented the Foundation at all of the Signature Events. For this and many other reasons, he should always have a prominent position in the history of the Foundation.

Another issue which festered throughout my years on the board was the relationship between the local chapters and Foundation. Some chapters were large, active, financially solvent and maintained a separate tax exempt 501c3 status. Others were loosely organized, with few members and little, if any, programs. Bringing all under the parent umbrella with accountability to the Foundation without them feeling that they had lost

their individual identity remained a challenge. Potential issues of liability against the Foundation or actions of the chapters were also of concern. The “all chapter” meeting held at the Louisville annual meeting exposed many of the issues, feelings of mistrust and lack of communications. With the addition of Wendy Raney to the staff primarily as a chapter liaison a gradual period of resolution began. By the time of the Bismarck meeting, much had been accomplished to perpetuate a better understanding and a sense of mutual responsibility by all parties. From talking with other national organizations, such as the American Red Cross, Trout Unlimited and Alzheimer Associations, chapter issues seem to be common. In some instances issues can be detrimental to the entire organization.

The relationship between the Council and Foundation was also critical. The Council had made a substantial comeback from its point of near self destruction. Bob Archibald was almost entirely responsible for this reversal. The national observance was essentially a triad of major events; Corps II – the traveling exhibit sponsored by the L&CNHT, the 14 signature events, promoted by the Council, major funding by the L&CNHT and presented by the 14 respective communities and finally the Missouri Historical Society’s national exhibit “Lewis and Clark, The National Bicentennial Exhibition” which opened in St. Louis and then toured four cities. Interspersed with these were scores of re-enactments, plays, exhibits, pageants seminars and forums. Some were noteworthy, most were largely forgettable. A broader evaluation in determining value probably should center on the effort, not the result. At some point a tome will be published critically reviewing the bicentennial, not unlike *Sinking Columbus* (a review of the 500 anniversary of Columbus). Bob Archibald was acutely aware of the miscues of the Columbus effort. His efforts to involve Native Americans helped minimize anthropological and public relation problems.

Throughout the bicentennial the Foundation was involved, but not a player. It provided a sense of legitimacy to the other activities and acted as a conduit of L&CNHT funds to other organizations being funded by the Challenge Cost Share (CCS) program. The Foundation had become financially dependent on the NPS to maintain its operations, the NPS had become dependent on the Foundation to act as its primary partner in its effort to manage the entire designated trail. The Council had amassed a sizeable debt of which the Missouri Historical Society had underwritten. A lingering question was the interpretation of the original Memorandum of Understanding between the Council and Foundation. The MOU clearly stated that surplus Council funds at the time of the Council’s “sunset” (2007) would revert to the Foundation, the more important question was if the Foundation might have a responsibility to assume possible Council debt, which was estimated in excess of \$1 million. Ultimately, a very early US Mint coin issue program which was to revert profits (per authorizing legislation) of sale of bicentennial commemorative coins to both the Council and the National Parks Service was in jeopardy because of a determination on the NPS’s ability to collect. Bob Archibald was able to have new congressional legislation passed which changed the disbursement criteria. The new program allowed the Council to receive the full amount and then grant the Foundation approximately \$1.5 million for trail stewardship programs. The Council was able to satisfy all existing debt and initiate a legacy program for indigenous language preservation. Carol Bronson deserves enormous credit for navigating the Foundation through these negotiations.

The issue of extending the trail, as defined in the authorizing legislation which created the Lewis & Clark National Historic Trail, was also problematic. The NPS's official trail started at Camp River Dubois, in Hartford, Illinois and terminated at Fort Clatsop, outside of Astoria, Oregon. A group of Foundation members and board members were extremely supportive of the extension back to the east coast. The majority felt that Monticello, where Jefferson first drafted his letter of instruction to Lewis should be the designated start while others felt that Philadelphia should receive the designation. The trail would roughly follow the land journey to Pittsburgh, where the keelboat was built and delivered and then the water journey to Camp River Dubois. Various members of congress, primarily members of the Virginia, Kentucky at times Indiana delegation would make it an issue and give support. The legislation failed to progress, facing rapidly evaporating congressional support for all things Lewis and Clark and stiff, behind the scenes, resistance from western states. The legislation still resurfaces with each congress. At the end of 2007 the legislation has not moved.

I began my term of president at the annual meeting in Bismarck, August 2004. Because of the change in bylaws, my term would extend through September 30, 2005 to coincide with the Foundation's fiscal year. Patti Thomson was president-elect and Jim Gramentine was vice president. Phyllis Yeager was secretary, Chuck Holland was treasurer.

Foundation finances once again were becoming a major issue. The short term solvency, thanks to the NPS, was not the issue. Long term viability was a major concern. Associated with this concern was the manner in which to manage the investment portfolio of the Foundation. The Foundation had been able to amass about \$400,000 in assets during its existence. The fund was being managed by the H Group, a Portland, OR investment company. This association began when John Montageau, was president and resided in Portland. Key issues centered on the choice of securities, management fees and the role of the finance committee. The market had recovered since 2002, and most funds showed respectable, if not good performance. I had asked Clay Smith of Great Falls to chair the investment committee. Other members of the committee included Ladd Seaberg, John Montageau and Jim Mallory and Chuck Holland - all with proven investment experience. Another issue was the determination of exactly how funds that had been specifically established for a stated purpose should be managed. The original intent of some of the originators was somewhat ambiguous. Former Foundation treasurer, Jerry Garrett, provided valuable historical background. Based largely on Jerry's recollection, Chuck Holland and the committee were able to re-establish a baseline of intent. During my tenure, the committee and Chuck worked to identify a new investment firm and implement an investment plan for the Foundation. Completion of this cycle was not totally complete until after I left office.

At the Bismarck meeting, the board also authorized the creation of a fundraising staff position. The decision to do this was hotly debated. I believe there was universal agreement that the organization needed to raise money, the problem was by what means. The following was already evident; federal money through the NPS would probably not be available after 2007 or 2008, the membership base had reached a high point in 2003 and was falling and advertising in *We Proceed On* (WPO) was beginning to decline. The

board authorized a one year use of investment funds to fund this position. Ultimately a Great Falls resident was hired as development director. The position remained funded for a little over one year without generating expected returns. The reasons are many with sufficient shared responsibility that I believe no single person failed.

There are typically three board meetings each year, one of which coincides with the annual meeting. I elected to hold the first meeting at the Skamania Lodge in Oregon. The Foundation had apparently previously met there. It provided a somewhat sequestered environment to conduct Foundation business, and was close enough that Larry McClure and other organizers of the 2005 Portland annual meeting could make a presentation. The meetings went reasonably well. The issue of "branding" of the Foundation was of particular interest to one of the board members. A committee was formed with a report, including a proposed style manual, being presented at the next (Spring) meeting. The other issue of merit was that of the Foundation taking a proactive stand on a public issue. This issue was a request on Foundation support for a willing seller, willing buyer policy to secure scenic property along the Columbia River, an important part of the trail. The board elected to support the proposed action, not before extended debate. Foundation staff members also gave extended reports on their respective activities. The result was by offering minute details of certain staff activities (especially in terms of membership incentives) the staff opened themselves to extensive attempts by the board to micro-manage. Staff and board both demonstrated that much was to be learned on how to conduct board business. At this meeting I also attempted to consistently use Robert's Rule of Order to conduct the meetings. Such use was mandated by the by-laws. My experience from previous board meetings was that they were often ineffectively run, with less than desirable results. Meetings also had a habit to be too long. The responsibility of the secretary was also refined. The minutes would now reflect the actions of the board as opposed to a running record of what was said. This was an important action, consistent with contemporary standards of board accountability. Several personality conflicts arose among the board members, not unexpected.

The second meeting was in the Spring in Great Falls. I believed it was extremely important to get the board to Great Falls once a year. This saved travel expenses incurred by the Foundation for the staff and allowed the board to visit the administrative offices. At this meeting the previously cited "branding" report was accepted. This later became an issue as the de-facto committee chair not attending. A semantic question of intent as to whether the board had voted to accept the report or had voted to implement the findings of the report would later surface. During this meeting the first formal report of the Third Century Committee was presented. This committee had been formed in Philadelphia by Ron Laycock to look at the Foundation role in the future. Members included Bill Bronson, Carol Bronson (ex-officio), Page Henley, Ron Laycock, Dennis Limberhand, Darrell Martin, Jim Rosenberger, Herman Viloa and Jane Weber. It was chaired by Jim Gramentine.

The Foundation's strategic plan which had been adopted in 2001 needed to be updated. A committee was formed and a basic framework was created to begin the process at the Portland annual meeting. It was also decided to enlist a professional facilitator in an attempt to eliminate bias. Sharon Brown, a planner with the NPS, was made available to



the Foundation. The first meeting would allow input from chapter, board and representatives of the general membership.

The relationship with the L&CNHT was also evolving. Gerard Baker, first appointed superintendent of the L&CNHT had accepted another position and was replaced with Steve Adams. Steve had distinguished himself as superintendent of the Brown v. Board of Education National Historic Landmark in Topeka, KS. This culminated in a nationally acclaimed event attended by President Bush and Supreme Court Justices. Gerard was a highly charismatic leader and very articulate, Steve was a career professional, exceptionally knowledgeable in the inner workings of NPS bureaucracy. As the Foundation worked on revising its 5 year strategic plan, the L&CNHT worked on revising its general management plan. Both organizations maintained solid working relationships.

In July of 2005 I spent a week in Great Falls to participate in the community's Lewis & Clark commemoration. The city had spent years planning and organizing. There were the requisite seminars, retailers, re-enactors and the NPS's Corps II. Hindsight would determine the event was too long and revenue and participation fell short of expectation. However, the event was a reflection of the community, produced and financed by local citizens and was something in which they should take great pride. I was proud that week to be in Great Falls, proud of the Foundation and probably got a intuitive glimpse of what Lewis & Clark, 200 years removed, meant.

A new program was initiated to better foster chapter communication and participation. Wendy Raney launched a series of regional meetings where several chapters could get together, build camaraderie and enjoy a program designed to bring the Foundation to the chapters in a relatively informal venue. The meetings held in Jefferson City, Missouri and Omaha, Nebraska were well attended and worth the effort. I also attended the Spring 2007 meeting in Kansas City. Again, a positive experience.

The 2005 annual meeting in Portland was "my meeting" being the president at the time of meeting. Held on the campus of Lewis & Clark College, it was a natural setting. The local chapter, with input of the Foundation, had done an exemplary job of scheduling and presented a well organized and informative event. The Oregon National Guard was well represented and reinforced the military nature of the original expedition. The bus trips were also well planned, informative and fun.

A "fund raising" private reception was held and attended by about 60 guests prior to the beginning of the meeting. It was an enjoyable evening, but after reconciling expenses it would be better described as public relations event as opposed to fund raising. At this point I began to have concerns about the performance and effectiveness of the fund raising (development) position and employee.

Jim Merritt, longtime editor of *We Proceed On* had earlier given notice that he would relinquish the position at the end of 2006. Jim had consistently edited and published a high quality journal. He was highly respected in the Lewis & Clark community. A search committee was formed to find a replacement. Ultimately, and at Jim's initial suggestion, Wendy Raney would assume editorial duties. WPO continues to be a solid publication.

The initial strategic planning meetings were held at the meeting. Using Sharon Brown as a facilitator was a good decision. She provided a forum in which all participants were able to have their opinions heard, but kept the sessions on track and focused.

Growing concerns were becoming evident on Patti Thomson's readiness to assume the office of president. A full year remained in the bicentennial, long term funding was still in doubt, the conversations with the Council concerning Mint revenue were ongoing and the projected role of the Foundation in the post bicentennial era was largely undefined. Patti was a long time member of the Foundation, had led the nomination committee for years and was held in high esteem by all. Her remarks and presence in Portland were tenuous at best.

The board, in balance, performed well, although some members with very strong personalities began "recruiting" weaker members to form blocks. The eastern extension proposal remained a rallying cry for several members. The awards presentation was poorly executed. The resulting marathon program alienated many and ultimately was an embarrassment to the Foundation.

At the conclusion of the Portland meeting, I had about six weeks remaining as president. I was extremely involved with the final design and preparation of bid documents for the Fort Osage Education Center and found increasingly less time to actively engage in Foundation business. My schedule prevented me from attending the Washington/Oregon signature event in November. Initial bids for the Education Center were rejected because of cost and a frantic 90 period of design alteration and re-bidding took place. Patti tendered her resignation and Jim Gramentine assumed the position of president. I did participate at the January 2006 board meeting in St. Louis. Construction of the Education Center began in April and totally consumed by life. The Center opened in November of 2007 surrounded by political controversy.

The Lewis & Clark Trail Heritage Foundation continues to be something I care deeply about. I few random observations are in order:

1. While the Lewis & Clark Expedition is part of our nation's history and a remarkable epic of exploration, it is primarily a story about the West, and as such, finds most of its support in parts of the country through which it traveled. This does not diminish its significance to other regions. The story has everything to do with the land and the indigenous people encountered who were part of that cultural landscape. That landscape needs to be experienced to understand the true nature of the expedition.
2. In its present format the membership basis will probably remain static, at best.. Even with the enormous hype encountered during the bicentennial, the organization saw only modest membership gains with many of the new members dropping after their first or second year.
3. The Foundation will remain static unless it aggressively pursues an environmental mission of trail conservation and preservation. It also most get its members actively engaged in physical activity in projects associated with the trail.

4. The Foundation must find an economic engine which will assist in underwriting some of its activities. In its present model, its members are too few in numbers to create a meaningful corporate tie in. During the Bicentennial, tourism was the most dominate association. While the expedition still drives tourism, primarily in direct trail states, the numbers do not generate enough dollars to support a national initiative. Smaller communities such as Great Falls, Montana and Washburn, North Dakota will successfully break that model, but there is little, if any, competition for tourism dollars in those communities.
5. Great Falls is the capital of Lewis & Clark. The US Forest Service has created an impressive facility with knowledgeable staff and the local community strongly supports the facility. It is an appropriate "home office" of the Foundation.
6. The focus of the Foundation's library needs to gradually shift from "library" to Foundation's archive. Other institutions, such as the Lewis & Clark College's collection are extensive and more easily accessed. The American Philosophical Society, Peabody, Missouri Historical Society and Filson should remain the holders of the cultural collection. Contemporary scholarship and interpretation, in addition to material generated since the creation of the Foundation in the 1960s, along with the history of the Foundation should be primary holdings. I believe the library has moved in this direction recently.
7. The annual meeting needs to be kept affordable and fun. The most popular events will continue to be those in the western states.
8. While the Foundation has attempted to draw in African American and Native American members and officers, the Foundation will remain predominately white, middle class. While open to speculation, the bicentennial failed to produce any real engagement among diverse groups. The manner in which president-elect Chris Howell, a Pawnee from Kansas, is received will be interesting.
9. The Foundation needs to become environmentally pro-active. We should not be afraid to take a stand, properly researched and discussed, and advocate it.
10. If the current endowment campaign is not successful, exploratory discussions should be held with the Oregon California Trail Association (OCTA) concerning a possible merger.
11. A bi-annual administrative assessment of the staff should be conducted to determine if administrative expenditures are in balance with program expenditures.
12. If membership levels remain between 2,500 and 3,000, the administrative model under which the Foundation operates should be assessed.

Respectively Submitted:

Gordon Julich  
New Year's Eve, 2007  
Kansas City, Missouri