THEODORE ROOSEVELT ASSOCIATION
STRATEGIC PLAN, 2022-2027

Executive Committee Meeting of TRA Board of Trustees, September 22, 2022

Foreword

This document presents the Strategic Plan for the Theodore Roosevelt Association for the coming five years. It is the collective work of members of the Strategic Planning Committee, made up of members of the Executive Committee, other Trustees, other members of the Association, and Roosevelt family members. This document was presented to the Executive Committee on September 22, 2022, for review and approval prior to its presentation to the Board of Trustees during our Annual Meeting. It is a living document and therefore may be amended periodically as necessary and appropriate.

Introduction

For over a century, the Theodore Roosevelt Association has fulfilled its congressional mandate: to perpetuate the memory of Theodore Roosevelt for the benefit of the people of the United States and the world. While this purpose remains the essence of our mission, we have elected to sharpen the TRA Mission and Vision Statements as the lead element in our Strategic Planning process. Over its long history, in good times and in bad, the TRA has honored and promoted the legacy of our twenty-sixth President.

Today we find ourselves with a real opportunity to expand our membership and influence younger generations of Americans to take up the challenge of perpetuating the legacy of TR. This Strategic Planning effort is designed as a call to action at a time when enlightened leadership is needed in so many areas of our society and our nation.

This Strategic Plan represents the effort and commitment of a number of prominent members of the TRA. It has been created in the tradition of earlier fruitful long-range planning initiatives in the 1970s and the 1990s.

The Strategic Planning Committee

In 2020, the Executive Committee authorized the formation of a Strategic Planning Committee assigned to produce a new plan for the preservation and growth of the Association and for continuing to perpetuate TR’s legacy. Those who have participated since the inception of the planning process include:
David Architzel, TRA President; Alice George, Vice President; Gregory Wynn, Vice President; Howard Ehrlich, CEO; David Folz, Treasurer; Steve Abbot; Ronald Christenson; Nicole Goldstein; Gary Kearney; Simon Roosevelt; William Tilchin; and Lee Yeakel.

We offer special thanks to the Roosevelt family – who arranged for Korn Ferry to host the first framing sessions for the planning process, with significant contributions from Myriam Michaels – and to Jerry Wind, who facilitated a working session of the committee to help us decide to focus on measurable objectives, with a common theme of “Enlightened Leadership” woven throughout.

The Strategic Planning Process

Building upon a first meeting with Theodore Roosevelt IV and other members of the Roosevelt family, we developed a systematic OODA (Observe, Orient, Decide & Act) process, which would assess our current situation and would enable us to identify and act upon areas needing improvement. The first goal in that process was to review and update our Mission and Vision Statements to reflect more accurately where the Association needs to go as it moves forward. The following were the product of that review and constituted our first step in our strategic initiative:

Mission Statement: “Chartered by an act of Congress in 1920, the Theodore Roosevelt Association perpetuates the legacy of the twenty-sixth President of the United States.”

Vision Statement: “The Theodore Roosevelt Association inspires individuals and enriches their lives through programs and activities and preserves Theodore Roosevelt’s memory in collaboration with our partners.”

It was also agreed that the theme of “Enlightened Leadership” would undergird all our efforts. Theodore Roosevelt embodied enlightened leadership, as was evident in his well-considered, farsighted policy initiatives as President in the areas of conservation, domestic reform, and diplomacy; in the 1912 platform of the Progressive Party; in TR’s voluminous writings on a wide variety of subjects; and in the high level of character he exhibited in all of the pursuits of his “strenuous life.”

Phase I of our two-phase Strategic Planning process began with our initial meeting and concludes with the presentation of the plan to the Trustees at this year’s Annual Meeting. Phase II will focus on developing and building on the work of Phase I and will run until the Annual Meeting of the Association in 2027.

Phase I entailed “observing and orienting” ourselves to the current state of the TRA and then establishing Strategic Pillars that would create a framework for the determination of the strategic priorities we set for the Association. The Strategic Pillars we established are:
Each Pillar group, led by members of the Strategic Planning Committee, then proceeded to set strategic objectives, generally within three defined time periods:

(a) Year One of the Strategic Plan: 2022-2023
(b) Years 2 & 3 of the Strategic Plan: 2023-2025
(c) Years 4 & 5 of the Strategic Plan: 2025-2027

The next portion of this document presents the strategic objectives developed for each Pillar. These objectives are specific propositions that define what we have achieved or will seek to achieve within given time frames and are measurable.

Pillar One - Legacy

YEAR ONE: This Strategic Plan’s umbrella theme of Enlightened Leadership has been defined and has taken root. With the active participation and support of the Houghton Library, we have established and funded an annual TRA Fellowship at Harvard University. In collaboration with the Theodore Roosevelt Center at Dickinson State University, the TRA Journal digitization project was launched in the spring and will be completed during the first half of 2023. We have created the position of TRA Public Historian and have appointed Dr. Michael Patrick Cullinane to that position, with a starting date of October 1, 2022.

YEARS 2-3: A separate annual event for TRA Book Awards will be instituted. We will begin exploring with Harvard the establishment of an endowed curatorship for the Theodore Roosevelt Collection. Work will begin on a second volume (covering the years 2015-2022) of the acclaimed TRA book *Spotlighting TR: Selections from the Theodore Roosevelt Association Journal*.

YEARS 4-5: If possible, we will help to establish the curatorship for the TR Collection at Harvard. The second volume of *Spotlighting TR* will be published and offered for sale to TRA members, other interested individuals, and libraries. We will continue (as in years 1-3) to produce a very high quality *TRA Journal*.

Pillar Two - Programs

YEAR ONE: We will match the TRA programs that are operating effectively now with a volunteer Trustee liaison, in a process overseen by CEO Howard Ehrlich. We will provide training sessions for these Trustee liaisons, designed to help them succeed in their roles.
YEARS 2-5: All current TRA programs (numbering sixteen in 2022) will be evaluated by the CEO, the Trustee liaisons, and the Executive Committee to determine their future. As needed, the CEO and the Trustee liaisons will refine or expand these programs. Recommendations for new programs will be considered and, when the decision is affirmative, implemented.

**Pillar Three - Partnerships/Membership/Roosevelt Family**

**Partnerships**

Year One: We have identified eight “strategic partners” and thirteen “other partners” and have held meetings with all these partners to explore how we can cooperate for mutual benefit. Partnership updates are being provided in The Arena.

YEARS 2-3: In order to enlarge and enhance cooperation, in November 2022 we will begin holding quarterly Zoom meetings with our strategic partners and semi-annual meetings with our other partners. We will identify TRA liaisons for as many of our partnerships as possible. Arena updates will continue.

YEARS 4-5 (and beyond): We will continue all the efforts launched in years 1-3.

**Membership**

YEAR ONE: Our primary objective for year one and beyond is to bring in substantial numbers of younger members. In this effort we are employing social media, are evaluating ideas for new youth-targeted programs and initiatives and are beginning to publish a “Youth Arena.” We engaged the services of a social media intern for the past summer. We will update our social media strategy during the remainder of the year.

YEARS 2-3: We will work with educators to develop a TR curriculum for elementary and secondary schools. We will creatively explore and begin to hold joint events with other organizations. We will hire a social media professional to strengthen our outreach to potential younger members.

YEARS 4-5: We will roll out our new educational curriculum. With the direct involvement of the TRA’s Executive Administrator, we will consider adjustments to our membership dues structure and implement any adjustments we decide upon.

**Roosevelt Family**

YEARS 1-5: We are seeking to engage more members of the Roosevelt family in participating actively in the TRA. We already have achieved some notable successes in this effort, and the publication of this Strategic Plan will be an important asset in this ongoing endeavor.
Pillar Four - Governance and Fundraising

Governance

YEAR ONE: We are encouraging broader Trustee participation by asking all Trustees to serve on at least one TRA committee. To protect our leadership, we are adding an indemnification provision to the TRA’s by-laws in October 2022.

YEARS 2-5: We will evaluate, and implement when advisable, proposals for changes in our governance structure. The Governance Committee will assess existing and new programs for their value and their cost, emphasizing the importance of sponsorship. We will focus more attention than previously on the designation of Honorary Members and Honorary Trustees, particularly regarding former Commanding Officers of the USS Theodore Roosevelt.

Fundraising

YEAR ONE: The TRA has enrolled in the Amazon Smile program. The TRA’s GuideStar rating is now gold. Our Charity Navigator status has been updated. Annual fundraising initiatives are (and will remain) a focus.

YEARS 2-5: We will engage in a concentrated effort to strengthen the Association’s long-term financial condition by pursuing corporate giving and by expanding the Dr. John A. Gable Theodore Roosevelt Association Legacy Society and the Theodore Roosevelt Association Sustaining Benefactors Society.

Concluding Summary

This is an ambitious plan that will serve to steer our course over the next five years. For this Strategic Plan to be successful, we will need all our Trustees and Advisory Board members – and many other TRA members as well – to participate actively. We are calling on everyone to find an area of interest and to volunteer your time and talents to help us attain all our strategic objectives. To paraphrase Theodore Roosevelt, there can be no greater satisfaction in life than doing worthwhile work. This Strategic Plan is fully in line with TR’s outlook. It is a call to action, and the TRA Strategic Planning Committee is confident that you will be equal to the challenge.

Submitted by David Architzel, TRA Chair and President, the Strategic Planning Committee