



# National Association for Interpretation

## STRATEGIC PLAN

July 2024–June 2028

Approved by the NAI Board of Directors, April 25, 2024



**Led by:**

Mukuyu Collective, LLC

[www.mukuyu-collective.com](http://www.mukuyu-collective.com)

**Developed in Collaboration with:**

NAI Strategic Plan Taskforce, NAI Board of Directors, NAI Staff, NAI Advisory Council, NAI Young Professionals Council, and NAI members

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## BACKGROUND

Founded over 30 years ago, the NAI is a 501(c)(3) not-for-profit professional organization dedicated to advancing the profession of heritage interpretation, currently serving about 6,000 members in the United States, Canada, and over thirty other nations. Individual members include those who work at parks, museums, nature centers, zoos, botanical gardens, aquariums, historical and cultural sites, commercial tour companies, and theme parks. Commercial and institutional members include those who provide services to the heritage interpretation industry.

The 2021-2024 NAI Strategic Plan was approved by the NAI Board of Directors on October 28, 2020. The 2021-2024 NAI strategic plan identified goals, strategies, and action items for 2021-2023 with aspirations that NAI serve as a “‘driving force’ in Justice, Equity, Diversity, Accessibility, and Inclusion in [our] field while providing resources and opportunities for leadership development, increasing our fiscal health and sustainability, increasing our value and services to our members, and expanding partnership opportunities and advocacy.” The 2021-2024 NAI Strategic Plan identified four goals listed below:

- Ensure organizational sustainability by cultivating membership, fostering leadership, maintaining fiscal health, and supporting existing and future NAI communities
- Meet the needs of members through relevant programs and services
- Collaborate with regional, national, and global partners to advance and advocate for the profession
- Be the driving force in addressing the issues of inclusion, diversity, equity, and accessibility (IDEA) within the interpretive profession

Since the approval of the new 2021-2023 NAI Strategic Plan, the organization has successfully navigated a major change in leadership, a strong financial position, and record multiple-year climb in memberships with over 7,000 members though 1,000 members did not renew during the pandemic. NAI has also strengthened its information technology (IT) infrastructure which allows for better customer service/interface and database management. The NAI board approved adding both the new JEDAI section and the Sustainability section to the NAI Communities, and the DEI committee ratified a new charter guiding and holding NAI accountable for its JEDAI commitments. NAI also successfully transitioned from only in-person to hybrid (e.g. in-person or online offering) Certification and Training courses. All of this in the midst of a global pandemic and recovery is a testament to the commitment of NAI members, staff, board, volunteers, and partners to the mission advancing the profession of heritage interpretation.

## 2024-2028 NAI STRATEGIC PLAN PROCESS

NAI board and leadership are eager to build a 2024-2028 strategic plan that builds on the NAI successes, fills identified gaps, and addresses growth areas to better meet the needs of members and the larger field.

The Mukuyu Collective was contracted in June 2023 to design and facilitate a strategic planning process. In addition, the Mukuyu team conducted an independent review of NAI's governance and operational business practices grounded in principles of justice, equity, diversity, and inclusion. Information from the quality review was used to revise the NAI strategic plan and implementation needs. The Mukuyu Collective also designed and facilitated a half-day NAI board member retreat to review 2020-2024 Strategic Plan outputs and outcomes and identify new goals, strategies, and actions to meet the NAI mission.

In addition, the NAI board, leadership, and Mukuyu team co-developed an NAI strategic planning task force to serve as the driving force in assessing current NAI practices and identifying strategic goals, actions, timelines, and measures of success. The task force also developed and administered a 2023 NAI member survey. The survey was opened during the 2023 NAI conference and included feedback on draft priority areas and goals with NAI membership councils at the conference. The survey remained open for an additional two weeks following the conference with active recruitment efforts led by NAI strategic plan taskforce members of NAI members to ensure strong representation. There were 449 respondents to the 2023 NAI member survey. This information was used to inform the NAI's new strategic goals. Key findings of this analysis can be found in the Appendix.

## 2024-2028 STRATEGIC GOALS & KEY STRATEGIES

With feedback from NAI members, partners, council leadership, and the NAI strategic planning task force, below are the recommended 2024-2028 NAI strategic goals, strategies, timelines, and measures of success for board consideration.

### **GOAL I: Ensure organizational and financial sustainability**

#### Key Performance Indicators:

- increase membership numbers overall
- increase NAI member satisfaction

#### Strategies

- Enhance fiscal planning, controls, and transparency through external reporting and internal dashboards
- Design and implement membership recruitment and retention & plan(s)
- Increase attendance at the NAI Annual Conference as well as NAI region and section convenings/conferences.
- Increase fundraising activities

### **GOAL II: Deepen and Lead JEDAI Implementation in Interpretation**

#### Key Performance Indicators:

- JEDAI-focused needs assessment completed
- JEDAI-focused guidelines and standards developed
- Number of partnerships formed, collaborative initiatives launched

#### Strategies

- Embed JEDAI principles and practices throughout NAI
- Create JEDAI-focused guidelines and powerful practices for NAI certifications including, definitions, principles, programs, courses, and professional development
- Promote accessibility and cultural awareness
- Expand diversity in membership and leadership
- Align JEDAI principles with NAI communications

### **GOAL III: Strengthen Programs and Partnerships**

#### Key Performance Indicators:

- increase member retention
- increase in cultural and historical interpretive trainings and presentations
- Technology Audit conducted
- Increase organizational partnerships
- Improve coordination between communities and NAI National office

#### Strategies

- Strengthen organizational memberships
- Refine Professional development and Training Programs
- Strengthen and align partnerships

### **GOAL IV: Strengthen Career Pathways to Interpretation**

#### Key Performance Indicators:

- develop of an Interpretation Career Pathways Guide
- increase in the number of schools (eg. high school, university/college programs, career education, etc) that have interpretive coursework
- increase NAI memberships that reflect the diversity of communities served  
gather demographic data for NAI members and for the larger field of interpreters nationwide.

#### Strategies

- Strengthen and align talent pipeline
- Focus on pre-career & early career professionals

## SCHEDULE OF ACTIVITIES

STRATEGY	ACTION	FY 2024-25	FY 2025-26	FY 2026-27	FY 2027-28										
<b>GOAL I: Ensure organizational and financial sustainability</b> <i>Key Performance Indicators: (1) increase membership numbers overall (2) increase NAI member satisfaction</i>															
<b>Strategy 1.1: Enhance fiscal planning, controls &amp; transparency</b>	Action 1.1.1: Performance dashboards and/or reports specific to board members, membership, and general public (annual report)	■	■												
	Action 1.1.2: Clarify community budget process, including reporting and integration with overall NAI budget			■	■										
<b>Strategy 1.2 Design and implement membership recruitment and retention plan(s)</b>	Action 1.2.1: Develop member recruitment and retention plan that highlights younger, diverse members				■	■	■	■			■				
	Action 1.2.2: Market to interpretive organizations the NAI benefits for interpretation professionals					■	■	■							
<b>Strategy 1.3. increase attendance at NAI Conference</b>	Action 1.3.1: Work with governmental agencies (e.g. the Federal Interagency Council on Interpretation) to increase agency attendance at conferences and other NAI events	■			■				■				■		

STRATEGY	ACTION	FY 2024-25				FY 2025-26				FY 2026-27				FY 2027-28			
	Action 1.3.2: Increase outreach to state, local, and independent interpretive sites/agencies near conference site																
<b>Strategy 1.4 Increase fundraising activities</b>	Action 1.4.1: Diversify revenue streams, including investment of existing savings and other revenue streams																
	Action 1.4.2: Highlight planned giving options for retired, longtime members																
<b>GOAL II: Deepen and Lead JEDAI Implementation in Interpretation</b> <i>Key Performance Indicators: (1) JEDAI-focused needs assessment completed (2) JEDAI-focused guidelines and standards developed (3) Number of partnerships formed, collaborative initiatives launched</i>																	
<b>Strategy 2.1 Embed JEDAI principles and practices throughout NAI</b>	Action 2.1.1: Create JEDAI-focused guidelines and powerful practices for NAI certifications, including definitions and principles, programs, courses, and professional development initiatives																
<b>Strategy 2.2 Deepen JEDAI application in accessibility and cultural awareness</b>	Action 2.2.1: Enhance NAI training programs, conferences, and services accessible for NAI members across sections, regions and national settings																
	Action 2.2.2: Develop and implement a JEDAI training program for all NAI staff, Community Leaders, and Board Members																
	Action 2.2.3: Host an NAI JEDAI Summit																



STRATEGY	ACTION	FY 2024-25				FY 2025-26				FY 2026-27				FY 2027-28			
<b>Strategy 2.3</b> <b>Expand diversity in membership and leadership</b>	Action 2.3.1: Establish connections and sustained relationships with other professional organizations that serve underrepresented groups																
	Action 2.3.2: Develop and administer an NAI mentorship and JEDAI ambassador program to support NAI members and councils																
<b>Strategy 2.4:</b> <b>Align JEDAI principles with NAI communications</b>	Action 2.4.: Ensure that all NAI publications, events, and promotional materials reflect a commitment to inclusion, diversity, equity, and accessibility through annual communications audit of materials																
<b>GOAL III: Strengthen Programs and Partnerships</b> <i>Key Performance Indicators: (1) increase member retention (2) increase in cultural and historical interpretive training and presentations (3) Technology Audit conducted, (4) Increase organizational partnerships, (5) Improved coordination between communities and NAI National office.</i>																	
<b>Strategy 3.1:</b> <b>Strengthen organizational memberships</b>	Action 3.1.1: Review and revise NAI membership structures, including pricing																
	Action 3.1.2: Expand member offerings to those in non-traditional interpretive careers. Explore options for a "Build Your Own" membership where members can choose their own benefits																
<b>Strategy 3.2:</b> <b>Refine Professional Development and Training programs</b>	Action 3.2.1: Assess and enhance learning materials and training to ensure cultural relevance and language equity																

STRATEGY	ACTION	FY 2024-25				FY 2025-26				FY 2026-27				FY 2027-28			
	Action 3.2.4: Increase professional development opportunities for those who work in cultural and historical interpretation																
	Action 3.2.5: Assess NAI’s current use of technology																
Strategy 3.3: Strengthen and align partnerships	Action 3.3.1: Identify and assess current NAI partnerships																
	Action 3.3.2: Review, reassess and enhance NAI Communities, including the Advisory Council and Young Professionals Council																
<p><b>GOAL IV: Strengthen Career Pathways to Interpretation</b>  <i>Key Performance Indicators: (1) develop of an Interpretation Career Pathways Guide, (2) increase in the number of schools (eg. high school, university/college programs, career education, etc) that have interpretive coursework (3) increase NAI memberships that reflect the diversity of communities served (4) gather data on demographic data for NAI members and for the larger field of interpreters nationwide</i></p>																	
Strategy 4.1 Strengthen and align talent pipeline	Action 4.1.1: Examine career pipeline in interpretation from high school to mid-career																
	Action 4.1.2: Enhance existing learning materials on the career pipeline																
Strategy 4.2 Focus on pre-career and early career professionals	Action 4.2.1: Co-develop a “Welcome to Interpretation” Series in collaboration with the Young Professional Council. Tie to Action 1.1 and develop what will work best for high school and college instructors.																

STRATEGY	ACTION	FY 2024-25				FY 2025-26				FY 2026-27				FY 2027-28			
	Action 4.2.2: Work with members and partners to identify and reduce financial, social, and cultural barriers to careers in interpretation																
<b>Strategy 4.3 Diversify the Field of Interpretation</b>	Action 4.3.1: Gather baseline data (e.g. age, career field, point in career, demographics) for professionals in the interpretation field																
	Action 4.3.2: Gather demographic information for NAI members and partners																
	Action 4.3.3: Expand NAI membership and professional development to reflect the diversity of communities served																

## MEASURES OF SUCCESS

<b>GOAL I: Ensure organizational and financial sustainability</b> <i>Key Performance Indicators: (1) increase membership numbers overall (2) increase NAI member satisfaction</i>			
STRATEGY	ACTIONS	TIMELINE	MEASURES OF SUCCESS
<b>STRATEGY #1: Enhance fiscal planning, controls and transparency</b>	Action 1.1: Develop reports and/or performance dashboards specific to the needs of the NAI stakeholder groups: (1) board members inclusive of finance, operations, staffing, etc., (2) members, inclusive of NAI trainings, advocacy, and (3) the general public on a NAI webpage	Board Dashboard: Fall 2024  Council Dashboard: Winter 2024/2025  Member/Public Report: Winter 2024/2025	<ul style="list-style-type: none"> <li>- increased membership numbers overall</li> <li>- increased NAI member satisfaction</li> </ul>
	Action 1.2: Clarify community budget process, including reporting and integration with overall NAI budget	Winter/Spring 2025	<ul style="list-style-type: none"> <li>- increase access and training on financial planning and control for communities</li> <li>- increased number of financial opportunities pursued</li> <li>- integration of region/section budgets within NAI budget</li> <li>- increased transparency of NAI financial information with members</li> </ul>

## GOAL I: Ensure organizational and financial sustainability

Key Performance Indicators: (1) increase membership numbers overall (2) increase NAI member satisfaction

STRATEGY	ACTIONS	TIMELINE	MEASURES OF SUCCESS
<b>STRATEGY #2: Design and implement membership recruitment and retention plan(s)</b>	Action 2.1: Develop member recruitment and retention plan that highlights younger, diverse members	Development Phase: Winter 2025  Pilot Phase: Spring 2025-2026  Refine & Integrate: 2027	- increased membership numbers overall  - increased membership retention  - increased percentage of young aged members, members early in their interpretation journey, and members who identify as part of underrepresented groups
	Action 2.2: Market to interpretive organizations the NAI benefits for interpretation professionals	Winter/Spring 2024-25	- increase in the number of members whose membership is paid for by their organizations
<b>STRATEGY #3: Increase attendance at the NAI Conference and Section/Regional Convenings</b>	Action 3.1: Work with governmental agencies (e.g. Federal Interagency Council on Interpretation) to increase agency attendance at conferences and other NAI events. <i>Note this includes virtual meetings.</i>	Annually	- increased attendance of federal employees at NAI conference
	Action 3.2: Increase outreach to state, local, and independent interpretive sites/agencies	Annually	- increased attendance at NAI Conference

## GOAL I: Ensure organizational and financial sustainability

Key Performance Indicators: (1) increase membership numbers overall (2) increase NAI member satisfaction

STRATEGY	ACTIONS	TIMELINE	MEASURES OF SUCCESS
	near conference site		<ul style="list-style-type: none"> <li>- Increased attendance at NAI virtual conference</li> <li>- local attendees exposed to NAI for the first time are retained as members</li> </ul>
<b>STRATEGY #4: Increase fundraising activities</b>	Action 4.1: Develop and diversify revenue streams including investment of existing savings, foundations, and other revenue streams	2024	<ul style="list-style-type: none"> <li>- increased revenue from savings and investments</li> <li>- increased revenue from foundations</li> <li>- increased individual donors</li> </ul>
	Action 4.2: Highlight planned giving options for retired, longtime members	2025	<ul style="list-style-type: none"> <li>- increased donations</li> <li>- NAI is included in bequests</li> </ul>

## GOAL II: Deepen and Lead JEDAI Implementation in Interpretation

*Key Performance Indicators: (1) JEDAI-focused needs assessment completed (2) JEDAI-focused guidelines and standards developed (3) Number of partnerships formed, collaborative initiatives launched*

STRATEGY	ACTIONS	TIMELINE	MEASURES OF SUCCESS
<b>STRATEGY #1:</b> <b>Embed JEDAI principles and practices Throughout NAI</b>	Action 1.1: Create JEDAI-focused guidelines and powerful practices for NAI certifications, including definitions and principles, programs, courses, professional development and initiatives to ensure consistent application. Materials will be more accessible through accommodations for people with disabilities (e.g. cognitive/neurodivergent and physical) and diverse audiences.	Taskforce in place by Spring 2025 - Definitions report by Spring 2026, Standards and Guideline by Spring 2027	<ul style="list-style-type: none"> <li>- Task force creates JEDAI-focused definitions and principles</li> <li>- Qualitative: Participant feedback indicates consistency in the application of JEDAI principles across NAI certifications, programs, and initiatives</li> <li>- Quantitative: Number of JEDAI-focused guidelines and standards developed</li> </ul>
<b>STRATEGY #2:</b> <b>Promote accessibility and cultural awareness</b>	Action 2.1: Make NAI training programs, conferences, and services accessible for NAI members across sections, regions, and national settings	2025 - define "universally accessible"  - 2025 Define accessible / Develop work plan by end of Definitions report in Spring 2026  -review current	<ul style="list-style-type: none"> <li>Recruitment/appointment of an initial advisory group within and external to NAI</li> <li>A work plan is developed in first 3-6 months</li> <li>Draft definitions document is developed and reviewed</li> </ul>

## GOAL II: Deepen and Lead JEDAI Implementation in Interpretation

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STRATEGY	ACTIONS	TIMELINE	MEASURES OF SUCCESS
		<p>program offerings using accessibility metrics</p> <p>2026 - Begin updating current programs, when possible. Implement process/guidelines for the creation of new guidelines/standards</p>	
	<p>Action 2.2: Develop and implement a JEDAI training program for all NAI staff, Community Leaders, and Board Members</p>	<p>Q1 - Q2 2025 - Landscape analysis &amp; needs assessment</p> <p>Q3-Q4 2025 - identify training needs and develop pilot training program</p>	<ul style="list-style-type: none"> <li>- Summary/overview of existing tools and resources</li> <li>- Identification of potential support for training program (i.e. contractor)</li> <li>- Needs assessment document completed</li> <li>- One pilot training program hosted and evaluated</li> <li>- Survey and landscape analysis by</li> </ul>



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STRATEGY	ACTIONS	TIMELINE	MEASURES OF SUCCESS
			Summer 2025 / Identifying training needs q4 2025
	Action 2.3: Host an NAI JEDAI Summit	Spring 2027	Briefing Document Completed with - Definition of Purpose  - Identification of funding sources  - Recruitment/appointment of Steering Committee
<b>STRATEGY #3: Expand diversity in membership and leadership</b>	Action 3.1: Establish connections and sustained relationships with other professional organizations that serve underrepresented groups	Ongoing	- Feedback from partner organizations on the effectiveness of collaborations  - Number of partnerships formed, collaborative initiatives launched
	Action 3.2: Develop and administer an NAI mentorship and JEDAI ambassador program to support NAI members and councils	2025 - Scope is contingent on IMLS grant starting in Q1	- Feedback from program participants on the value of mentorship and ambassadorship  - Number of mentorship matches made, participation rates in

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STRATEGY	ACTIONS	TIMELINE	MEASURES OF SUCCESS
			ambassador activities
<b>STRATEGY #4: Align JEDAI principles with NAI communications</b>	Action 4.1: Ensure that all NAI publications, events, and promotional materials reflect a commitment to inclusion, diversity, equity, and accessibility	Ongoing	Framework created to assess this strategy

### GOAL III: Strengthen Programs and Partnerships

*Key Performance Indicators: (1) increase member retention (2) increase in cultural and historical interpretive trainings and presentations (3) Technology Audit conducted, (4) Increase organizational partnerships, (5) Improved coordination between communities and NAI National office;*

STRATEGY	ACTIONS	TIMELINE	MEASURES OF SUCCESS
<b>STRATEGY #1: Strengthen organizational memberships</b>	Action 1.1: Review and revise NAI membership structures, including pricing	Review and propose revision before board meeting Spring 2025; implement changes to membership fiscal year 2025 - 2026.	- Board approval; increase in memberships at all levels, especially individual memberships; increased member retention
	Action 1.2: Expand member offerings to those in non-traditional interpretive careers <sup>1</sup> . Explore options for a "Build Your Own" membership where members can choose their own benefits.	Explore options: 2025  Identify and pilot options: 2026  Determine final options: 2027	- identify and pilot offerings  - engagement with non-traditional partners  - finalize offerings if member and board approved
<b>STRATEGY #2:</b>	Action 2.1: Assess and enhance learning	Review & Assess:	- All training materials reviewed for

<sup>1</sup> Note: non-traditional refers to people and/or organizations who use interpretation, but don't realize it e.g. Law Enforcement officers, public outreach officials, adventure and recreation guiding, outdoor leadership programming; experiential education, etc.).

## GOAL III: Strengthen Programs and Partnerships

*Key Performance Indicators: (1) increase member retention (2) increase in cultural and historical interpretive trainings and presentations (3) Technology Audit conducted, (4) Increase organizational partnerships, (5) Improved coordination between communities and NAI National office;*

STRATEGY	ACTIONS	TIMELINE	MEASURES OF SUCCESS
<b>Refine Professional Development and Training programs</b>	materials and training to ensure cultural relevance and language equity	2025-2026  Develop recommendations: Winter 2027	relevance and language equity  - Criteria developed for cultural relevancy and language equity to use for vetting all materials and programming  - Revisions implemented in materials
	Action 2.2: Increase professional development opportunities for those working in cultural and historical interpretation	Begin with St. Augustine conference RFPs; continue to implement and increase offerings in subsequent years	- Increase in cultural and historical interpretive trainings and presentations  - Increase in membership from organizations/individuals in this field
	Action 2.3: Assess NAI's current use of technology and strengthen technology integration (e.g. generative AI, virtual reality, etc.)	-identify best practices to measure effectiveness: Winter/Spring 2024-25  - Create assessment tool to pilot and use	- Best practices in tech and tech integration identified. - Technology Audit conducted  - Tech integration into program design, implementation, and

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STRATEGY	ACTIONS	TIMELINE	MEASURES OF SUCCESS
		Winter 2024-25  -Present findings: Spring 2026  - Review and revise tech policy: Fall 2026	
<b>STRATEGY #3: Strengthen and align partnerships</b>	Action 3.1: Identify and assess current NAI partnerships	Identify and develop a list of existing and potential new partners by the end of 2024; assess through 2025	- Increase organizational partnerships  - establish agency-level membership program
	Action 3.2: Review, reassess, and enhance NAI Communities, including the Advisory Council and Young Professionals Council	Evaluation and feedback gathering 2024 - 2025  - assess and redesign structure with feedback received 2025 and 2026	- Communities have a revised/new and enhanced structure that better serves members  - Improved coordination between communities and NAI National office  - Increased support for communities from NAI National

### GOAL III: Strengthen Programs and Partnerships

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STRATEGY	ACTIONS	TIMELINE	MEASURES OF SUCCESS
			office

### GOAL IV: Strengthen Career Pathways to Interpretation

*Key Performance Indicators: (1) develop of an Interpretation Career Pathways Guide, (2) increase in the number of schools (eg. high school, university/college programs, career education, etc) that have interpretive coursework (3) increase NAI memberships that reflect the diversity of communities served (4) gather data on demographic data for NAI members and for the larger field of interpreters nationwide*

STRATEGY	ACTIONS	TIMELINE	MEASURES OF SUCCESS
<b>STRATEGY #1: Strengthen and align talent pipeline</b>	Action 1.1: Examine career pipeline in interpretation from high school to mid-career	Begin review and revisions in Jan/Feb 2025. Complete work by mid-summer 2025.	- Increased awareness and documentation of NAI member demographics including age and career progression - identify organizations with entry level trainings for early stage interpretation professionals
	Action 1.2: Enhance existing learning materials on the career pipeline	- Begin review and revisions in fall 2025 after engagement	- Learning materials are revised Development of a stand-alone career pathways guide

## GOAL IV: Strengthen Career Pathways to Interpretation

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STRATEGY	ACTIONS	TIMELINE	MEASURES OF SUCCESS
		meetings (Action 1.3) - Complete work by Spring 2026	- Revisit the current Interpretation Recruitment toolkit and reformat to make more useful for NAI instructors and members
<b>STRATEGY #2: Focus on pre-career and early career professionals</b>	Action 2.1: Co-develop a “Welcome to Interpretation” Series in collaboration with the Young Professional Council. Tie to Action 1.1 and develop what will work best for instructors	- Complete the series by EOY 2025	Increase in the number of schools (eg.g. University programs, career education, etc) that have interpretive coursework
	Action 2.2: Identify and reduce financial, social, and cultural barriers to a career in interpretation	Complete by EOY 2026	- Determining average salary for interpreters nation wide and comparing to NAI membership and events costs  - Identify NAI membership data as well as ethnic background of interpreters nationwide
<b>STRATEGY #3: Diversify the field of interpretation</b>	Action 3.1: Gather baseline data (e.g. age, career field, point in career, demographics) for professionals in the interpretation field	End of 2025	Average baseline data is determined

## GOAL IV: Strengthen Career Pathways to Interpretation

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STRATEGY	ACTIONS	TIMELINE	MEASURES OF SUCCESS
	Action 3.2: Gather demographic information for NAI members and partners	End of 2025	Average baseline data is determined
	Action 3.3: Expand NAI membership and professional development to reflect the diversity of communities served.	Ongoing; measured annually	Increased memberships that reflect the diversity of communities served



## **NAI STRATEGIC PLAN CONTRIBUTORS**

### **NAI Taskforce Members:**

- NAI Board Members:
  - Parker McMullen Bushman, President
  - AJ Chlebnik, Advisory Council Board Representative
- NAI Staff
  - Paul Caputo, Executive Director
  - Kat Jackson, Certification Program Administrator
- NAI Advisory Members:
  - Bevin Carithers
  - Marisol Asselta Castro
  - Chuck Lennox
- NAI Young Professionals Council Representatives:
  - Brendan Kane

### **Mukuyu Collective Team**

- Taishya Adams, Project Lead
- Marisol Rodriguez, Strategic Advisor and Co-facilitator

## APPENDIX I: NAI TASKFORCE & MUKUYU QUALITY REVIEW FINDINGS

To inform and guide the new strategic plan, the NAI task force conducted a document review of NAI current programs, initiatives, and projects, administered a 2023 NAI member survey, and met with representatives of the NAI advisory council, NAI young professional council, NAI regions, and NAI sectors group feedback. Below are the identified strengths and growth areas based on the feedback provided.

### Strengths

- **JEDAI Commitment:** There is recognition by NAI survey respondents and task force representatives that the organization has demonstrated its commitment to JEDAI internally and externally. Younger respondents considered JEDAI a high priority.
- **Member Professional Development-** According to the 2023 NAI Member Survey, 84% of respondents were fully aware of the online learning opportunities AND agreed that NAI's membership "provides me with valuable professional development resources."
- **Certification Programs:** Many NAI members indicated that the certification program was their entry into NAI.
- **Natural Heritage Interpretation:** Many NAI members indicated that the natural heritage programs are the strength of the organization. There is a desire to elevate the historical and cultural interpretation to the level of natural heritage.
- **NAI Conference:** Attendees indicated that there was a range of offerings from early career to supervisory offerings though there were more options for early career.
- **Partnerships:** NAI's participation in the Interp Tech conferences with California State parks was shared as an example of NAI partnerships that support member peer networking and professional development.
- **Communications:** Respondents appreciated having access to the magazine online. This format allows for easy sharing and multimedia content.

### Growth Areas

- **Membership**
  - **Totals:** There has been an increase in membership following the pandemic, but those numbers have plateaued over the last year. After surpassing 7,000 NAI memberships in 2019, membership fell to 6,000 at the end of 2020-21 and is now at 6,500 at the end of 22-23.

- Cost: There were concerns about the cost of membership and the need to clarify member benefits. There is an interest in more employer-paid memberships as finance was a primary barrier to membership for conference respondents who were not currently members. Younger, earlier career conference attendees were primary non-members.
  - Membership Composition: The NAI membership does reflect the same racial/ethnic demographics as the nation. NAI continues identifying barriers to entry and/or participation through its JEDAI workgroup.
  - Member Communication: Participants requested that NAI use a variety of communication methods beyond email, including social media. There is also interest in phone calls and actual letters for older members who may not be as technically savvy.
  - Membership Benefits: Participants requested more information about member benefits.
  - NAI Volunteer Leaders: There are concerns that there are too many responsibilities and not enough support for the regions and sections. There were recommendations to consider either discounted membership and/or free conference registration for NAI volunteer leaders.
- Partnerships: Some members are not aware of the partnerships NAI has established to support their professional development, network, and impact.
  - Job Boards: Though NAI provides a job board, there is interest in a more robust structure that connects members to careers.
  - JEDAI Aligned Training and Certifications: Building on the success of NAI's internal JEDAI commitments, there is an interest in new training and certifications focused on JEDAI, updating existing NAI certification programs, and tools for members that can be used with their organizations. There is also a request to improve cultural humility and learning cohorts to discuss hard topics.
  - Technology in Interpretation: There is an interest in training how to use generative artificial intelligence and other emerging technologies in the training and certification programs.

## APPENDIX II: NAI BASELINE DATA

Note: Data that is not entered either does not exist or will be gathered during the implementation of the plan

STRATEGY	BASELINE DATA TYPE	2020	2021	2022	2023
<b>GOAL I: Ensure organizational and financial sustainability</b> <i>Key Performance Indicators: (1) increase membership numbers overall (2) increase NAI member satisfaction</i>					
<b>Strategy 1.1: Enhance fiscal planning, controls &amp; transparency</b>	NAI Membership Numbers with demographic information	6949	6293	6135	6493 <a href="#">Monthly Membership Numbers year over year</a>
	NAI Member Satisfaction Data from Surveys	<a href="#">2020 survey</a>			<a href="#">Member/Former/Neve r Member Survey</a>  <a href="#">JEDAI survey</a>
<b>Strategy 1.2 Design and implement membership recruitment and retention plan(s)</b>	NAI Membership Numbers with demographic information	6949	6293	6135	6493
	Memberships expired (with retention rate) each year, not by member type	4113 Retention Rate: 60%	3870 Retention Rate: 60%	3982 Retention Rate: 61%	4637 Retention Rate: 49%
	Memberships from PDE offerings (CIG/CIH, professional courses, professional certification applications)	1810	1603	2123	1812

STRATEGY	BASELINE DATA TYPE	2020	2021	2022	2023
<b>Strategy 1.3. increase attendance at NAI Conference</b>	Number of government staff participants at NAI conference				
	NAI conference attendance information	1348 (completely virtual)	445 in person 582 virtual	696 in person 210 virtual	625 in person 108 virtual
<b>Strategy 1.4 Increase fundraising activities</b>	NAI Annual Revenue by type (e.g. governmental grant, foundation, membership, etc.) NOTE: Total revenue FY22 (not by type)	\$1,709,212.18 (includes PPP)	\$1,565,591.33 (includes PPP)	\$1,507,180.92	\$1,734,304.60
	NAI donations from planned giving	—	—	—	\$5,000
<b>GOAL II: Deepen and Lead JEDAI Implementation in Interpretation</b>					
<i>Key Performance Indicators: (1) JEDAI-focused needs assessment completed (2) JEDAI-focused guidelines and standards developed (3) Number of partnerships formed, collaborative initiatives launched</i>					
<b>Strategy 2.1 Embed JEDAI principles and practices throughout NAI</b>	NAI branded JEDAI resources/ materials that are available to members and/or the public				
<b>Strategy 2.2 Deepen JEDAI application in accessibility and cultural awareness</b>	Participant feedback data from NAI led trainings focused on JEDAI				<a href="#">JEDAI survey</a>
<b>Strategy 2.3</b>	Feedback from partner				

STRATEGY	BASELINE DATA TYPE	2020	2021	2022	2023
<b>Expand diversity in membership and leadership</b>	organizations on the effectiveness of collaborations  Number of partnerships formed, collaborative initiatives launched				
	Number of NAI mentorship matches	Program did not exist		Program started in October	41
<b>Strategy 2.4: Align JEDAI principles with NAI communications</b>	Number of NAI developed publications, events, and promotional materials that reflect a commitment to inclusion, diversity, equity, and accessibility				
<b>GOAL III: Strengthen Programs and Partnerships</b> <i>Key Performance Indicators: (1) increase member retention (2) increase in cultural and historical interpretive training and presentations (3) Technology Audit conducted, (4) Increase organizational partnerships, (5) Improved coordination between communities and NAI National office.</i>					
<b>Strategy 3.1: Strengthen organizational memberships</b>	NAI member numbers by membership type				
<b>Strategy 3.2: Refine Professional Development and Training programs</b>	Number of NAI led cultural and historical interpretive trainings				
<b>Strategy 3.3:</b>	Number of NAI partnerships				

STRATEGY	BASELINE DATA TYPE	2020	2021	2022	2023
<b>Strengthen and align partnerships</b>					
<b>GOAL IV: Strengthen Career Pathways to Interpretation</b> <i>Key Performance Indicators: (1) develop of an Interpretation Career Pathways Guide, (2) increase in the number of schools (eg. high school, university/college programs, career education, etc) that have interpretive coursework (3) increase NAI memberships that reflect the diversity of communities served (4) gather data on demographic data for NAI members and for the larger field of interpreters nationwide</i>					
<b>Strategy 4.1 Strengthen and align talent pipeline</b>	NAI membership information by demographics including age and career progression				
<b>Strategy 4.2 Focus on pre-career and early career professionals</b>	Number of schools (eg.g. University programs, career education, etc) that have interpretive coursework				
	Data about the number of interpreters nationally	Data need; NAI doesn't have this national data			
<b>Strategy 4.3 Diversify the Field of Interpretation</b>	Data about the number of interpreters nationally	Data need; NAI doesn't have this national data			