

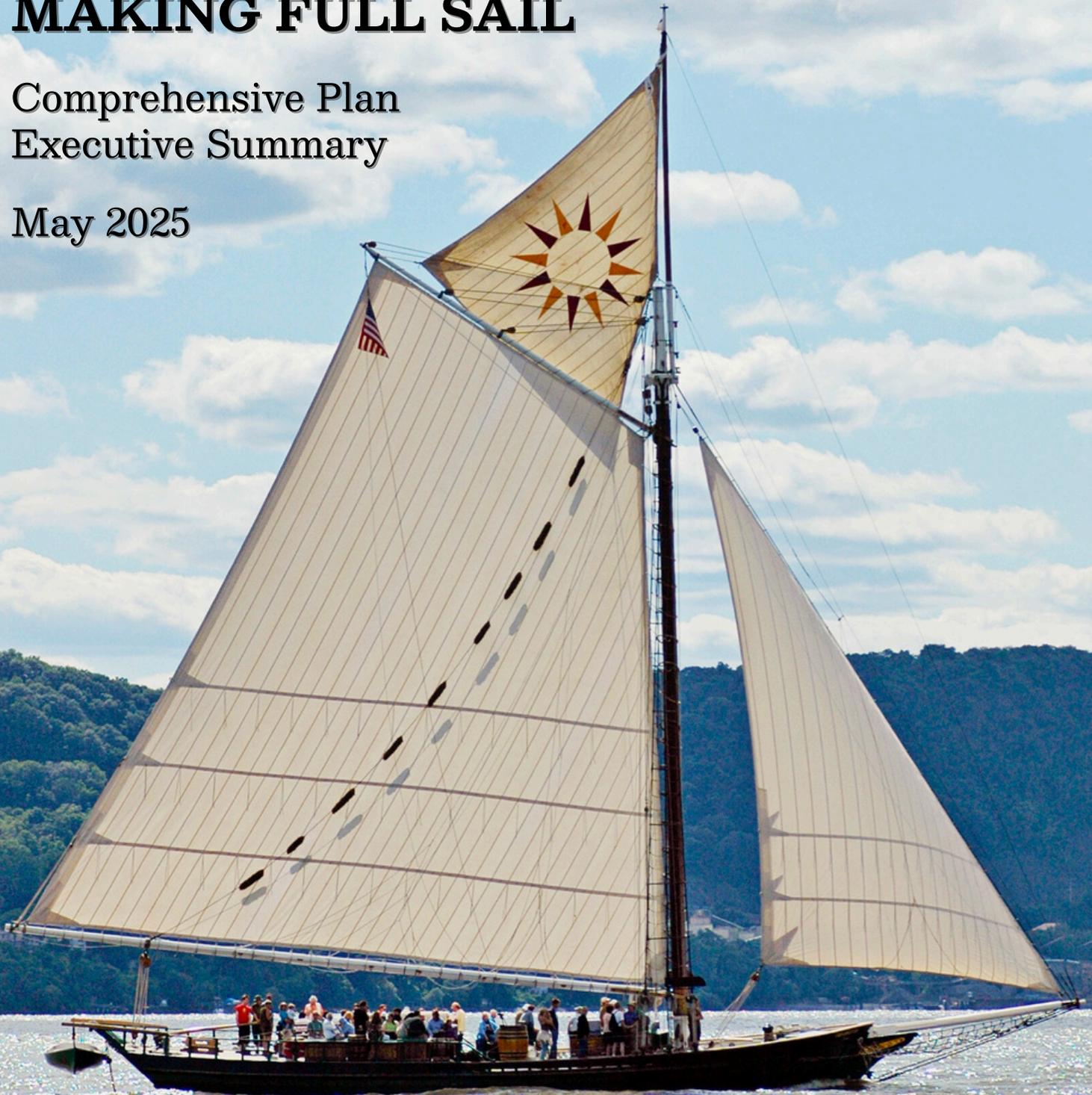


**Hudson River
Sloop Clearwater**
America's Environmental Flagship

MAKING FULL SAIL

Comprehensive Plan
Executive Summary

May 2025



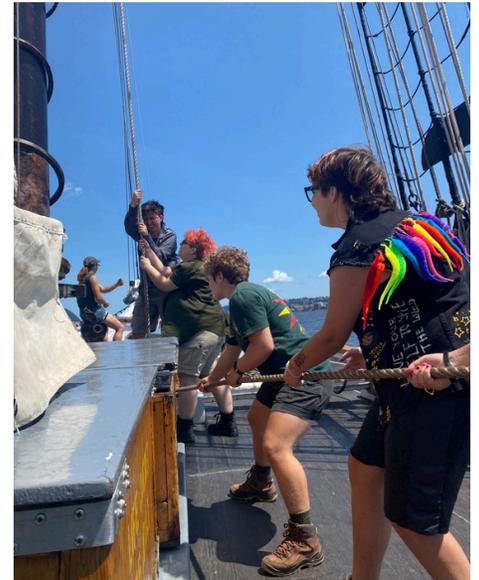
“The organization must be as resilient as the Sloop!”

Introduction

Recognized as America’s Environmental Flagship, the Sloop *Clearwater* has sailed for nearly 60 years, championing protection of the Hudson River and hosting award-winning education programs. While most historic sloops have a lifespan of 7-14 years, *Clearwater* has a potentially limitless lifespan. As the 57-year-old boat’s parts show their long use, they are restored, updated, and renewed through thoughtful planning and stewardship.

The nonprofit organization that operates the *Clearwater* must be tended to as intentionally as the boat. And it can be sustained in the same way: by periodic assessment—then repairing and renewing where we must.

“Make full sail!”—a nautical command to get the most out of a vessel—has never been more important to *Clearwater*. The organization is ready to haul hard on every sheet to catch the breeze.



A Vital Update

Repeated financial instability has jeopardized the organization’s future. Persistent shortfalls require an operable solution. In May 2024 on the heels of an emergency appeal, Executive Director David Toman recruited and convened a Business Model Planning Task Force of education, business, and maritime professionals and *Clearwater* staff and board members to address *Clearwater*’s chronic financial crisis.

Working together for a year, the Task Force created a data-driven, actionable Comprehensive Plan charting a path to annual surpluses and a financially sustainable, mission-driven future.

The Plan includes detailed analysis and documentation of finances, revenue strategies and tactics, and clarifies existing and future roles and responsibilities. These interdependent factors are integrated in annual implementation plans, and supported by detailed spreadsheets and Key Performance Indicator trackers, to ensure an achievable five-year plan.



What makes it new?

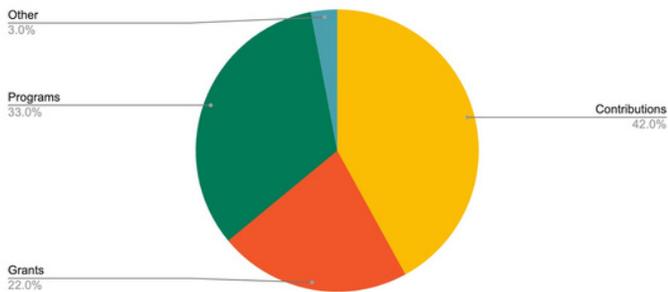
Today’s 2025-2029 Comprehensive Plan aligns with the 2021 Strategic Plan and echoes aspects of a 2016 Stabilization Plan. This prior work identified viable routes to sustainability, but the organization was unable to implement them due to bandwidth, nonprofit industry shifts, and the pandemic.

Crucially, today’s Comprehensive Plan identifies specific new actions to take, new audiences to approach, and actionable mechanisms for doing so. It also provides for personnel, job descriptions, and measurements to enable prioritization, focus, and tactical redirection. Most important of all: it has staff and Board support.

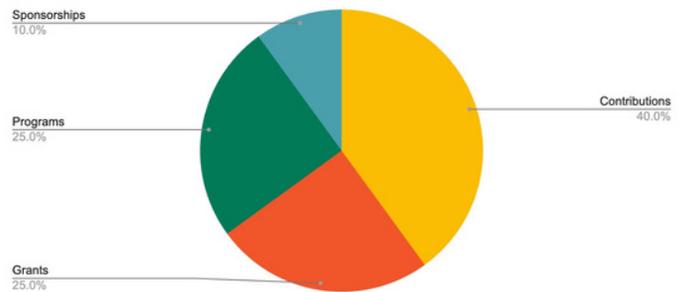
What's the Plan?

1. New Financial Targets: What does it take to sustainably run the organization year after year? To retire debt, maintain the Sloop, keep pace with inflation, grow reserves, and attract and retain staff, the Plan creates a pathway to operating budget growth over 5 years from an unsustainable \$1.67MM to a sustainable \$3MM.

Average Revenue Distribution (2016-2023)



Planned Revenue Distribution



2. Shifts in Revenue Mix: To achieve its growth targets, Clearwater will strategically refocus its revenue-generating efforts by optimizing philanthropic contributions, expanding its donor base, and creating exciting new recreational, musical, and educational programming, while optimizing sail and program pricing to enable the broadest possible access for schools and the public.

The organization has shifted focus from a single annual music festival. We are excited to build community by producing and partnering for leaner, varied musical programming on and off the Sloop.

3. New Hires, Adjusted Roles: Growth requires investment. Clearwater has already begun staffing and contracting for much needed and long under-resourced projects such as financial oversight, systematic grants management, sponsorships, and donor cultivation. These in-progress and future hires will allow greater specialization and intensified focus on major gifts, new strategic partnerships, Sloop utilization, music events, and volunteer management.

The Plan itemizes job functions across every current and future role in the organization.

4. Rigorous Measurement: The Plan defines Key Performance Indicators (KPIs) across all departments including financial performance, donor retention rate, outreach, program revenue, and more. Task Force members will continue to work with staff to build new dashboards and customize existing donation and booking platforms to regularly report these metrics and assess progress toward goals.

5. Planning and Process: Each year the departments will meet with the Executive Director to prioritize annual goals and commit to specific KPIs, using new planning tools and templates provided in the Plan. The organization will review KPIs throughout the year on the frequency defined in the annual planning meeting, and correct course as needed.



A New Course, Thanks to You

After the emergency appeal, Hudson River Sloop Clearwater was able to operate through 2024 until the adoption of this new Comprehensive Plan because of the generosity and support of its major donors, sustaining members, Board of Directors, elected officials, local and national media, and thousands of concerned individuals throughout the Hudson Valley and New York City.

Some were motivated by a love of Pete and Toshi Seeger and the organization's other founders. Others were Sailing Classroom alumni. You may have taken a public sail and fallen for the estuary's broad reaches and dramatic Highlands. Or you were captivated by the joy of the Great Hudson River Revival. This Plan is our thanks, and our pledge to you to keep Clearwater sailing in the spirit of its founding and with all of our ongoing reverence for the Hudson and our shared natural world.



Your support carries us forward together

Join us to protect the Hudson and steward the next generation of environmental leaders! Clearwater is charting a path toward resilient and sustainable funding so the Sloop can continue sailing, educating, and advocating for another 60 years. Supporters like you are the wind in our sails. Make a gift or become a member today at clearwater.org.



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