



**LEWIS & CLARK**  
**INTO THE UNKNOWN,**  
**JOURNEY OF DISCOVERY**

BY FCC SERVICES<sup>SM</sup>

**SEPTEMBER 2-4, 2020**  
**GREAT FALLS, MONTANA**

## THE LEWIS & CLARK EXPERIENCE

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### Key Program Objectives Include:

- Understanding the power of vision and common purpose
- Considering the importance and value of thinking and acting differently
- Seeing a situation from another person's point of view
- Thinking deeply about going out "into the unknown" and exploring our uncertain future
- Planning a flexible strategy to help shape and create a positive future
- Gaining insight into being a team of equals
- Acknowledging the value of diversity in a team and utilizing it successfully

# EXPERIENCE OVERVIEW

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## *Into the Unknown, Journey of Discovery*

Using the perilous Lewis and Clark Expedition as a historical backdrop, this program focuses on leading into the unknown. As leaders, we often have no idea what new possibilities, and yet unidentified obstacles, await us as we face the future. Leading into the future in today's complex and changing environment requires courage and the right skills to face changes in the way we do business and with whom, how life is lived, and how the mission will be achieved.

Three pivotal leadership themes, *Imagining a Different Future*, *Portaging into the Unknown*, and *Creating a Lasting Legacy*, come alive in this 2.5 day program. Meriwether Lewis and William Clark's 1804 expedition into the uncharted West provides an optimal context for discovery and development of critical leadership skills.

The events of the Lewis and Clark Expedition with the Corps of Discovery provide us today with insights and examples of:

- Shared leadership
- Building a great team
- Capitalizing on the advantages of diversity
- Strategic thinking and preparation for moving into the unknown
- Combining strengths and learning from differences
- Communicating clearly and effectively
- Self-management
- Becoming comfortable with ambiguity
- Making critical decisions in uncertainty
- Embracing unfamiliar new possibilities
- Mapping new territory for others to follow
- Ensuring a lasting legacy for future generations

Join us as we take our own *Journey of Discovery* with a trip along the Expedition route on the Missouri River to the Gates of the Mountain, visit an ancient buffalo jump, and gather at Ryan's Dam to view the majestic and impassable waterfall that threatened to end the Expedition.

# AGENDA

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## WEDNESDAY, SEPTEMBER 2

## IMAGINING A DIFFERENT FUTURE

**7 a.m. to 8 a.m.**

Catered Breakfast  
(Participants only\*)

**8 a.m. to 9:15 a.m.**

Meeting Room

**Welcome, Introductions and Opening Remarks**

**Imagining a Different Future**

**Passionate Purpose, Productive Partnering**

Leslie Hilton, Jack Uldrich and Jeff Appelquist

**9:15 a.m.**

Lobby

Depart for Lewis & Clark Interpretive Center  
(Participants Only\*)

**9:30 a.m. to 11:30 a.m.**

Lewis & Clark Interpretive Center

**Lewis & Clark Interpretive Center**

Short film, tour and discussion

Jack Uldrich and Jeff Appelquist

**11:30 a.m.**

Return to Hotel

**11:45 a.m. to 12:15 p.m.**

Meeting Room

**Debrief**

**12:15 p.m. to 1:15 p.m.**

Catered Lunch  
(Participants Only\*)

**1:15 p.m. to 3 p.m.**

Meeting Room

**Future Think, Meaningful Mentoring, Honoring Differences**

Jack Uldrich and Jeff Appelquist

**3 p.m. to 5:15 p.m.**

Meeting Room

**Facilitated Discussion – Journey of Discovery**

Jack Uldrich, Jeff Appelquist, Leslie Hilton

**6 p.m.**

Lobby

Depart for Museum, Group Reception & Dinner  
(Participants and Guests)

**6:15 p.m. to 8:30 p.m.**

TBD

**Museum, Group Reception & Dinner (Details to follow)**

(Participants and Guests)

**8:30 to 8:45 p.m.**

Return to Hotel

# AGENDA

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## THURSDAY, SEPTEMBER 3

**6:30 a.m. to 7 a.m.**

Catered Breakfast  
(Participants only\*)

**7 a.m. to 7:20 a.m.**

Meeting Room

**Lewis & Clark Video**

**7:20 a.m. to 8:30 a.m.**

Meeting Room

**Portaging into the Unknown  
Absolute Responsibility**

Jack Uldrich and Jeff Appelquist

**8:45 a.m.**

Lobby

Depart to Gates of the Mountains  
(Participants only\*)

**8:45 a.m. to 10:45 a.m.**

Travel to Gates of the Mountains  
Scenic route of Lewis & Clark's journey along the Missouri River  
Jack Uldrich and Jeff Appelquist

**11 a.m. to 1 p.m.**

**Gates of the Mountains Experience (boat ride)**

Guided Narration

**1 p.m. to 2 p.m.**

Gates of the Mountains Pavilion

**Open Your Mind to New Possibilities  
Realistic Optimism, Aggressive Analysis**

Catered Lunch

Classroom Content and Debrief

Jack Uldrich and Jeff Appelquist

**2:10 p.m. to 3:30 p.m.**

Travel to First Peoples Buffalo Jump, Photo Stop

**3:30 p.m. to 4:30 p.m.**

**Looking East**

Jack Uldrich and Jeff Appelquist

Content and Discussion

**4:30 p.m. to 5 p.m.**

Return to hotel

**5 p.m. to 6 p.m.**

Meeting Room

**Moments of Truth**

Classroom Debrief

Jack Uldrich and Jeff Appelquist

# AGENDA

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**6:30 p.m.**

Lobby

Depart for Group Dinner  
(Participants and Guests)

**6:45 p.m. to 8:45 p.m.**

Meadowlark Country Club

**Group Dinner**  
(Participants and Guests)

**8:45 p.m. to 9 p.m.**

Return to Hotel

# AGENDA

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## FRIDAY, SEPTEMBER 4

## CREATING A LASTING LEGACY

**6:30 a.m. to 6:45 a.m.**

Pick-up Catered Breakfast (take to classroom)  
(Participants only\*)

**6:45 a.m. to 7:15 a.m.**

Meeting Room

**Creating a Lasting Legacy  
Lewis & Clark Return Trip  
Cultivating a Corps of Discovery**

Jack Uldrich and Jeff Appelquist

**7:15 a.m.**

Lobby

Depart for Ryan's Island and Dam at the first Great Fall  
(Participants only\*)

**8 a.m. to 10:15 a.m.**

Ryan's Island Picnic Area

**Group Discussion and Wrap-Up**

Leslie Hilton, Jack Uldrich and Jeff Appelquist

**10:15 a.m.**

Return to Hotel

**11 a.m.**

**Adjourn**

\*Breakfast, lunch, and tours are for participants and faculty only.

## REQUIRED PRE-READ

[Click this link to read:](#) *Into the Unknown* by Jack Uldrich

## ATTIRE

Daytime dress is casual (jeans and shorts included) as many of the program sessions are being held outdoors. It is recommended that you dress for the weather and bring good walking shoes (no sandals or open toed shoes), sunscreen, an umbrella and light jacket. Dinner attire is casual (jeans included, but no shorts).

[Average Temperature in Great Falls](#)

# AGENDA

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## CPE Credits



FCC Services is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.learningmarket.org](http://www.learningmarket.org).

CPAs requiring continuing education credits are required to sign in on the Sign-In sheet located at the back of each session room to receive CPE credits for that session. You must also complete and sign a Request for CPE Credits Form, available at the conference registration desk. CPEs can be awarded in the following categories (all sessions offered as Group-Live delivery method):

• Personal Development	19.8 CPEs
<b>Total CPEs*</b>	<b>19.8 CPEs</b>

\*The total number of CPEs you receive for a session depends on you signing in for each session on the Sign-In Sheet. If you don't sign in for each session, you will not receive CPE credits for that session.

# FACULTY

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## **Jeff Appelquist**

*Facilitator/Instructor/Guide*

Jeff Appelquist is the founder and president of Blue Knight Leadership, LLC. He is a former US Marine Corps infantry officer, practicing attorney, and corporate executive. Jeff has more than 20 years' experience both as an entrepreneur and small business owner, and as a leader in Fortune 100 companies. He is also an award-winning author and expert in American military history.

Jeff has called upon his many years of widely varied professional experiences to create a unique and powerful individual leadership and team development program. He is a nationally recognized consultant, speaker, and teacher whose expertise, energy, humor, and passion help organizations forge great leaders and teams.

## **Leslie Hilton**

*Facilitator*

Leslie Hilton is FCC Services' Vice President of Governance/Board Development, in which role she oversees the organization's Premier Governance Series, Advanced Governance Series, and Gettysburg Leadership Experience, and works to further develop these and other programs to benefit individual cooperative directors as well as boards of directors. Leslie also oversees consulting and evaluation services for individual boards.

Leslie has a diverse background that includes consulting, legal and cooperative experience. For the past 22 years, she's managed her own consulting firm, SuccessPartner, LLC, working primarily with executives and senior managers at large, publicly traded corporations as well as smaller entrepreneurial companies. Among her clients was a member-owned credit union, providing her key insight into the cooperative model. With each, Leslie worked to develop high performance within mission critical teams and with senior leaders and boards of directors. In all her engagements, she strives to first understand the specific situations and unique challenges, and then to bring in effective solutions.

Earlier in her career, Leslie held legal roles in a corporate general counsel's office where she dealt, in part, with legislative affairs, experience that will serve Farm Credit organizations well given the recent increased focus on board standards of conduct. She has also served as a director and a chair for several non-profit organizations, so understands the requirements and challenges of meeting the fiduciary responsibilities that are key to the board's role.

Leslie holds a Bachelor's degree from University of Colorado and a Juris Doctor from University of Colorado School of Law. She earned a Master's of Science in Management, Coaching and Consulting for Change, from University of Oxford and HEC Paris.



# FACULTY

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## **Jack Uldrich**

*Facilitator/Instructor/Guide*

Jack Uldrich is a former naval officer, renowned global futurist, independent scholar, compelling speaker and best-selling author. He is highly regarded for his unique ability to present complex information in an entertaining, understandable, and digestible manner that stays with his audiences long afterwards. Jack, is a leading expert on assisting businesses to adapt, to unlearn and “let-go”, to embrace paradoxes, and think the unthinkable, so we can more successful in the future.

His books include the best-selling, *The Next Big Thing is Really Small: How Nanotechnology Will Change the Future of Your Business*, *Jump the Curve: 50 Essential Strategies to Help Your Company Stay Ahead of Emerging Technologies* and the award-winning, *Into the Unknown: Leadership Lessons from Lewis & Clark’s Daring Westward Expedition*. His forthcoming works include *The Unlearning Curve* and *Unlearning 101*, which proclaim that the most critical skill of the future is “unlearning” the rules, facts, and knowledge that take up too much space in our minds.

# SESSIONS & CASE STUDIES

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## **Welcome, Introductions & Opening Remarks**

Overview of the leadership context and three leadership themes for the program.

Objectives:

- Understand the 3 major areas of leadership that are relevant for an unknown future: imagining a different future, passionate purpose and productive partnering.

## **Lewis & Clark, Journey of Discovery - Short film, tour and discussion**

Illustrations of key leadership lessons from the expedition, and reflection/discussion of the leadership context.

Objectives:

- Learn about the leadership challenges encountered when leading into the unknown future.
- Reflect on ways leaders can meet those challenges based on the expedition's course.

## **Debrief**

Reflection and discussion about the requirements of leadership in the context of the uncertain future.

Objectives:

- Apply the learning about three major areas of leadership that are relevant to leading in uncertainty to participants' own situations.

## **Future Think, Meaningful Mentoring, Honoring Differences**

Presentation on key aspects of preparing to meet the challenges of the unknown in leading an organization or team into the future.

Objectives:

- Learn about the importance of strategic preparation for the future.
- Understand how diversity shapes success in facing the unknown.
- Develop an appreciation for mentorship from all sides when leading through uncertainty.

## **Facilitated Discussion – Journey of Discovery**

Active reflection and discussion of applied learning to participants' organizations.

Objectives:

- Participants will be guided through active reflection and discussion to capture key insights applicable to their own leadership.

# SESSIONS & CASE STUDIES

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## **Portaging into the Unknown: Absolute Responsibility**

Presentation on the principals of absolute responsibility for leaders facing the future.

Objectives:

- Learn the importance of leading from the front.
- Understand when to lead from the front, when to lead from behind.

## **Depart for Gates of the Mountains – Scenic route of Lewis & Clark’s journey along the Missouri River**

Reflect on the difficulties faced by the expedition leaders and their need to demonstrate effective leadership when facing the need to find a new way.

Objectives:

- Understand how adaptation and focus on the outcome impact successful leadership.

## **Gates of the Mountains Experience (boat ride)**

Discussion and reflection on the principles of leadership in adaption and team spirit to overcome significant unanticipated challenges.

Objectives:

- Develop appreciation for the importance of adaptability and team leadership when leading into the unknown.

## **Open Your Mind to New Possibilities – Realistic Optimism, Aggressive Analysis**

Presentation and discussion about the importance of aggressive analysis and realistic optimism in leading in uncertainty.

Objectives:

- Learn the importance of realistic optimism in leading successfully.
- Understand the role of aggressive analysis when facing new and unanticipated leadership challenges.

## **Looking East**

Discussion of leadership principles in connection with market disruption and unknown futures.

Objectives:

- Consider the impact of innovation for future success
- Explore the importance of paying attention to disruptive forces
- Understand the importance of being responsive and adapting to change to secure a successful future

# SESSIONS & CASE STUDIES

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## **Moments of Truth**

Presentation, active reflection and discussion on leadership moments of truth.

Objectives:

- Reflect and discuss responses to pivotal moments of truth in challenging leadership situations.
- Capture applications for learning in participants' leadership roles.

## **Creating a Lasting Legacy: Lewis & Clark Return Trip, cultivating a Corps of Discovery**

Presentation on the importance of focus and culture in effective leadership.

Objectives:

- Consider the importance of focus in achieving long-term objectives.
- Understand the role of culture in supporting accomplishment of long-term strategic objectives.

## **Group Discussion and Wrap-up**

Reflection and participant presentation of key learning and intention for creating a legacy of leadership.

Objectives:

- Reflect and present key learnings about leadership effectiveness from the program.
- Develop awareness of the legacy of leadership through individual effectiveness and application of the program lessons.
- Commit to effective leadership as a legacy.

# ACCOMMODATIONS

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## Hilton Garden Inn Great Falls

2520 14th St., SW  
Great Falls, MT 59405  
Phone: 406.452.1000

Check-in: 4 p.m.  
Check-out: Noon

[Hotel Website](#)

**Arrival:** September 1

**Departure:** September 4 (unless you are extending your stay)

## RESERVATIONS

A block of rooms has been reserved at the above hotel. Call the hotel directly at 406.452.1000 **by July 31** to make your reservations. To ensure you receive the group rate, please ask for the FCC Services room rate.

**Room rate:** \$129 for single/double occupancy and is subject to applicable state and local taxes. Taxes are subject to change without notice.

All reservations received after the cut-off date will be accepted on a space or rate available basis. The rate will be available three days pre and post the conference dates if made prior to the cutoff date, based on availability.

### Cancellation Policy

All reservations must be guaranteed by check or a major credit card. Reservations canceled within 24 hours of arrival are subject to one night's accommodations.

## TRANSPORTATION

### Courtesy Bus Shuttle

Once you arrive at the Great Falls airport, guests must call the hotel front desk for a courtesy shuttle pick-up (406.452.1000). The distance between the airport and hotel is one mile (5 minute drive time).

### Other Transportation

Taxi: \$10 (minimum charge)

# ACCOMMODATIONS

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## DRIVING DIRECTIONS

From the North and South on I-15 – take exit 278 – 10th Ave S. exit. Travel one-fourth mile to Exit 0. At the first traffic light, turn left. The hotel is immediately on your left.

[Hotel link for Maps & Directions](#)

## GUEST PACKAGES

Guests are welcome to attend *some functions* at the Lewis and Clark Experience. Attendees may bring one (1) guest and the guest must be added to the attendee's registration to attend as advance bookings and badges are required at the events. If you do not purchase the guest package at the time you register and later decide to bring a guest, you will need to update your registration record with the guest package purchase and add your guest's name before the deadline.

The guest package is \$300 and includes:

- Transportation to and from Charles Russell Museum (Day 1)
- Reception and Tour the Museum and Art Gallery (Day 1)
- Lewis and Clark Expedition Cuisine – Dinner (Day 1)
- Transportation to Dinner (Day 2)
- Dinner (Day 2)

*No other meals or functions are included.*

Guest Package Deadline: August 12

## CITY MAPS, TOURS & THINGS TO DO IN GREAT FALLS

- [City of Great Falls, MT](#)
- [Great Falls Convention and Visitors Bureau](#)
- [Things to do in Great Falls](#)
- [Suggested things to do from Hilton Garden Inn](#)
- [Lewis and Clark Interpretive Center](#) (Walking Tour)
- [Giant Springs State Park](#)
- [Bert & Ernie's Tavern and Grill](#) (Good Place to Eat)

# SUGGESTED READING

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Ambrose, Steven

[Undaunted Courage](#), Simon & Schuster, 1996

Burns, Ken

[Lewis & Clark Journals](#), Reading & PBS Film

Uldrich, Jack

*Into the Unknown (full book)* ([Barnes & Noble](#), [Amazon](#), [Kindle Edition](#), [Google Play ebookstore](#))

