

THE NATIONAL TRUST FOR HISTORIC PRESERVATION TOWARD A NEW LEVEL OF SUCCESS

In the coming months, the National Trust for Historic Preservation will pursue an important set of changes.

The imperative behind these changes is both mission-driven and financial. Over the past decade, the Trust has established itself as the national voice for preservation. It has begun to expand the scope and diversity of its own historic sites, become a vocal advocate on Capitol Hill, completed two successful fund-raising campaigns and blazed the trail on important preservation trends, from environmental sustainability to the push to protect the cultural heritage of “modern” buildings.

Despite these successes, and many more, the Trust itself has experienced a decline in many critical metrics, including operating revenue, cash reserves, membership, attendance at its preservation conference and publication subscriptions. Staff, trustees and partners have repeatedly observed that the organization is spread too thin, operating far more programs than it has the capacity to carry forward effectively.

At the same time, the Trust’s partners have challenged the organization to engage a broader and more diverse group of people in the work of preservation — to make the movement more accessible, more relevant and better funded.

With this context in mind, the Trust spent the past year in a comprehensive review of its programs and its role within the preservation movement as a whole. The review included meetings and roundtable discussions with Trustees, staff, partners, and preservation and Main Street professionals nationwide. It also included a four-month assessment of more than 40 separate programs, projects and initiatives of the Trust in early 2011.

As part of the review process, the Trust asked challenging questions about where the organization and the movement are now, and where they want to be in the next 10, 20 or 50 years. The result of this dialogue is a new strategic framework — Preservation10X — that aims to increase the Trust’s impact and scale by a factor of 10.

Preservation10X is built on the awareness that inaction is not an option. The Trust must streamline and focus its programs simply to remain viable as a non-profit in the decades ahead. But to be truly relevant, the Trust must make fundamental changes in where, how and with whom it works.

The Power of Place

Over the decades, the Trust has positioned itself primarily as an association, helping to establish and strengthen a network of state and local partner organizations while acting as a national convener for the preservation movement. This work has been tremendously important; to cite just one statistic, when the Trust started its partners program in 1993, there were 16 statewide preservation groups nationwide. Today there are 46, including the District of Columbia and Puerto Rico.

All told, there are more than 10,000 private preservation groups operating nationwide. Many of these organizations have come into their own in recent years, and as a result, their needs are changing. This was clear in a recent Trust survey, where more than 1,000 preservation groups responded to questions about what sort of services they want from the Trust.

The results showed far more interest in higher-level assistance — in-depth information and case studies, increased funding and leadership on federal advocacy — than in the traditional roster of organization-building materials and services. The wider preservation community is looking to the Trust to bring preservation to the forefront nationally.

To tackle this challenge, the Trust must find a way to reach beyond its current base of supporters and make preservation visible and relevant to a much broader group of like-minded constituents. The good news is that marketing research conducted by the Trust has already identified a promising target audience: 15 million Americans who share the preservation ethic and are taking action on behalf of historic places. This group is younger than the Trust's traditional leader base — half are under the age of 35; they are as diverse as America. They are the future of the National Trust and they preservation movement, but they are virtually untapped currently.

These “local preservationists” will likely see the Trust as an important ally if the organization can demonstrate its relevance to their interests, and Preservation10X provides an opportunity to do just that. At its heart, the strategy acknowledges a truism every preservationist knows and market research has borne out: preservation is most compelling when it deals in real places that demonstrate the power of preservation to contribute to communities. Nothing compares to the tangible experience of buildings restored, economies improved, local communities revived.

For that reason, Preservation10X dramatically increases the Trust's commitment to direct, on-the-ground action at important and threatened sites nationwide. The positive success stories that come out of this work will provide a far more effective tool for raising funds and engaging and inspiring local preservationists than the Trust's traditional focus on basic organization building.

Tomorrow's Trust will function less as an association and more as the leader of a clear, specific and compelling *cause*: saving historic places. This represents the best way to build a broader, more diverse movement, one that empowers all of America's preservationists, trained professionals and grassroots champions alike, with the tools and resources they need to succeed.

Preservation10X

To accomplish this vision, Preservation10X clarifies the work of the Trust. It makes clear where the organization will focus its energy and resources — and where it will not. It charts four paths forward:

- 1. Identify and protect America's most important and threatened “National Treasures.”** This is the heart of the Trust's work, and the area that will grow most over time. The National Treasures will be an evolving list of 100 important

places — historic buildings, neighborhoods, communities and landscapes across America. The organization will bring all of its resources to bear at these priority places, developing coordinated preservation and fund-raising strategies, influencing key audiences, engaging the right partners and getting results on the ground. The first group of 25 will be in place by 2012. The first full portfolio of 100 National Treasures will be in place by 2014.

The Trust has developed a set of criteria to guide the selection of these priority places, to ensure that the portfolio — taken as a whole and over time — is of exceptional value in reflecting the full stories of the American experience. To reach this goal, each National Treasure must be of national significance, or the preservation-based solutions employed there must have national implications for the efficacy and visibility of the preservation movement.

Beyond the fundamental considerations of national significance and national implications, National Treasures will be chosen based on how well they leverage the strengths of the National Trust, indicate the possibility of a successful — even if challenging — outcome, and ideally, enable us to work with partners to achieve mutual goals.

2. Advocate for laws, regulations and funding to support historic preservation.

The Trust intends to take an even more proactive role in advocacy for preservation at the federal level. The organization will increase its visibility in the halls of Congress, to ensure that lawmakers consider the economic, community and cultural benefits of historic preservation. It will identify a small set of advocacy issues for which it will take a strong stand and build coalitions of support, becoming the “go-to” organization on preservation with government officials, as well as media and grassroots advocates.

3. Support leaders in historic preservation. The Trust is only able to take this new course forward because of the strength of its local and statewide partners. These preservation leaders represent the core of the Trust’s support. Going forward, the Trust will serve this group with greater access to in-depth information on preservation issues, higher-level training and more focused leadership on federal advocacy. The Trust will spend less time on basic organizational development activities and more time working shoulder-to-shoulder with partners to advance critical preservation priorities.

4. Reach out to a broad base of supporters. As noted above, America’s 15 million local preservationists are an untapped but critically important group. The Trust will reach out to them through a wide range of channels, from traditional and social media to cause marketing programs. These efforts will help to engage and mobilize a new generation of members and preservation supporters.

Spanning all four of these areas will be the Trust’s work on cutting-edge issues: important preservation questions or trends that require a cross-Trust team approach, funding, and focused attention for a set period of time. These “priority themes” will replace the Trust’s multiple program priorities. Given the Trust’s size and budget, the organization is unlikely to exceed four to six themes at any one time.

The priority themes will be a filter in choosing National Treasures and will guide decisions about which advocacy efforts to undertake, and, to the extent appropriate, outreach to local preservationists and preservation leaders.

The four initial themes will be:

- ***Sustainable Communities.*** The Trust is committed to supporting economic, environmental and cultural sustainability in the communities where it works.
- ***Diversity and Place.*** America has a rich and complex story that has not always been recognized in history books or by the preservation movement. The Trust is committed to broadening the cultural diversity of its work.
- ***Public Lands.*** Federal and state governments control millions of acres of land rich in historic places. The Trust will focus significant attention on working with government partners to protect these cultural treasures.
- ***Tomorrow's Historic Sites.*** America has more than 10,000 house museums open to the public and most are facing serious challenges in staying relevant to American interests. The Trust will use its 23 historic sites to explore innovative, replicable strategies for 21st century historic sites.

To undertake all this work, the Trust has developed a five-year financial plan, which will make it possible to allocate resources to support the Preservation10X framework. The financial plan projects both operating and capital needs as well as potential strategies for funding this vision. For instance, to raise revenue, the Trust is currently evaluating the feasibility of a \$200 million capital campaign, the quiet phase of which could begin as soon as February 2012. To strengthen its operating endowment, the Trust will explore the possibility of selling the national headquarters building at 1785 Massachusetts Ave. This will have the added advantage of providing our staff with 21st century office amenities not available in our current space.

Putting It All Together: A More Focused Organization

Preservation10X brings a new level of focus, coordination and discipline to the Trust's work. It establishes clear priorities for saving critical places and expanding the preservation movement nationally.

The Trust's recent success at the Wilderness Battlefield demonstrates the power of this approach. A coordinated campaign of legal, legislative and media outreach, undertaken in collaboration with a coalition of local partners, prompted Walmart to withdraw its plans to construct a 240,000 square foot, big box development within the original boundaries of the battlefield. Moreover, the Trust helped Walmart find an alternate site and has opened a door to larger discussions about including preservation in future siting decisions.

To facilitate such strategic, place-based campaigns, the Trust will restructure its operations, consolidating many of its preservation functions in an expanded and reorganized preservation division. The reorganization brings greater integration among the organization's programs and historic sites, and increased ability to

mobilize resources quickly to respond to threats and opportunities. An expanded focus on specific priority places also strengthens the Trust's ability to tell its story to current and prospective supporters.

Among the most important organizational changes are the following:

- **Field Office Operations.** The Trust has operated regional offices principally to support the building of a robust partner network and to respond to requests from the field. With much of that network now in place, the Trust will shift the focus of its field staff to direct action on behalf of the National Treasures.

This change has two immediate implications. First, many current field staff will be redirected to work on developing preservation strategies, building coalitions, raising funds and designing approaches to preservation at National Treasures. As budget and preservation needs allow, new field staff will be added. Second, to facilitate work at National Treasures, the Trust will need more field offices distributed across a wider geographic area. Simply put, the Trust must be where the action is, closer to the ground. This shift is essential to success, and the current regional office structure will change to meet this need.

- **Historic Sites.** The Trust's historic sites department will have two overarching goals:
 - 1.) To move the portfolio of Trust-owned sites to higher levels of programmatic quality, structural integrity and financial sustainability. Immediately, the Trust will begin to develop new operating models for four challenged historic sites: Chesterwood, Farnsworth, Lyndhurst and Woodlawn. These will be used to identify, study and implement new operating models that enhance the preservation of the sites and increase their financial sustainability. At two of the sites, Lyndhurst and Woodlawn, regular daily tours and some public programming will be suspended to allow full attention to the re-visioning process. The work at these sites is expected to yield innovative approaches to historic site management, which will be applicable to other historic sites nationwide.
 - 2.) To develop a new type of "affiliate" relationship that does not have ownership requirements for the Trust but establishes a network that shares expertise and provides an opportunity for the Trust to co-brand, thus expanding its visible footprint. Over time, the network is expected to grow to 500 or more affiliated sites.
- **Main Street.** The Main Street Center and methodology have brought tremendous value to communities across America. But to fit this successful and tested model into the Trust's new focus on saving National Treasures will require changes to the Main Street program. Over the coming year, the Trust will collaborate with Main Street staff, the Main Street network and interested parties to accomplish a thoughtful exploration of a full range of options including: reshaping the program to fit better within the Trust's new framework; spinning Main Street off as a subsidiary that maintains a clear connection with the Trust while also providing greater operating and fundraising independence;

or an independent nonprofit organization that takes Main Street programming to the next level while maintaining a partnership connection with the Trust.

- **Preservation magazine.** All National Treasures campaigns will require strong marketing and public relations capacity to succeed. Given the Trust's budget constraints, hiring additional staff to fill this need is not immediately possible. Therefore, the organization will shift staff capacity from *Preservation* magazine to the National Treasure teams. As a result, the Trust will reduce the frequency of *Preservation* from six issues per year to four issues per year. This change will enable the organization to redeploy 25 percent of its marketing capacity to these priority places.

Moving from Planning to Action

Preservation10X is a growth strategy and a plan to build a stronger Trust. It calls on the organization to integrate all its functions around the key priorities of taking direct action at the National Treasures, and expanding and strengthening the national historic preservation movement through advocacy, outreach and support for preservation partners.

By bringing greater focus to the Trust's work, Preservation10X has the potential to create a whole that is greater than the sum of its parts, positioning the organization for a future in which the Trust — and the cause of historic preservation — is more visible, relevant and financially successful.

Preservation10X recognizes the connection to place as one of the great forces of the human experience. And it puts the Trust in front of that force. Few efforts promise so great a return so far into the future.