



NATIONAL TRUST
for HISTORIC PRESERVATION

The Next Trust
Strategic Plan for the
National Trust for Historic Preservation
February 2004

*The National Trust provides leadership, education, advocacy and resources
to save America's diverse historic places and revitalize our communities*

The Next Trust

We come from every corner of the earth, bringing riches of culture, tradition and artistic expression and a distinctive texture to our national consciousness. We are bound together as a people in place, community, and heritage in ways that are infinitely nurturing. *We are Americans – and our heritage connects us, one to the other, over time and place.*

For more than 50 years, one organization has worked to ensure that preservation of this heritage has a meaningful place in the landscape of American values. That organization – the National Trust for Historic Preservation – stands today as an independent, privately funded, non-profit institution of 200,000 members. ***As its core mission, the Trust provides leadership, education, advocacy and resources to save America's diverse historic places and revitalize our communities.***

Working with individuals and organizational partners across the nation, the National Trust has, in recent years, achieved results unprecedented in its history. America is a better and stronger society today because people throughout the country have joined together to protect, interpret and revitalize our places and communities. As we continue the work to deepen the preservation ethic, more Americans will experience first hand the historic places and communities that comprise our nation's collective historic, aesthetic and cultural heritage.

To build upon that legacy of strength, the *Next Trust* will underpin its future by leveraging our *core organizational values*. We will draw upon and demonstrate the *rich diversity of our shared national heritage*, bringing to life the real stories of real people through places saved and communities revitalized. We will *build and nurture collaborative and mutually beneficial partnerships with statewide and local organizations, Main Street communities, historic sites and others* that bring local capacity and expertise to our shared work in broadening the preservation ethic in America. And, we will deepen and broaden *educational efforts directed toward all Americans to connect America's stories to her people.*

A Strategic Plan for the Next Trust

This strategic plan presents a blueprint for the *Next Trust* as the willing and natural leader of the national preservation movement. The plan details the pathways for building on our recent successes to realize very focused and tangible outcomes.

Eight strategic initiatives at the heart of the *Next Trust Strategic Plan* will guide the National Trust in the management of its programs, fundraising initiatives, allocation of resources, development and expansion of partnerships, and consideration of priorities and opportunities. *Together these eight initiatives will unleash the potential of the preservation ethic, leverage preservation tools to revitalize America's communities and save her historic places, and assemble financial and other resources adequate to support critical preservation work at the local, state, and national levels.*

Great civilizations define themselves in many ways. Important among these are the buildings and communities they create, as well as those we choose to protect and preserve and revitalize. Preservation's goal is to ensure that our rich and diverse heritage of buildings and communities and their environments will be experienced, understood and appreciated by the present generation and preserved and protected for the enjoyment and benefit of future generations.

Historic preservation is as much about the context of historic buildings – neighborhoods, town centers and community spirits – as it is about the buildings themselves. In America's urban and rural centers from West to East, people of diverse backgrounds and different interests – preservationists, developers, government leaders and citizens, lenders and investors – are coming together to define new ways for preservation to revitalize our nation, preserve historic places and save the sense of community from extinction.

Through partners, places and people across the decades, we are a nation holding history – with great care – in our hands.

Our Goals

Although our work is astonishingly diverse, the goals of the National Trust may be simply stated:

1. **Save Historic Places** – *The National Trust expands its commitment to save America’s diverse historic places and communities.* To reach this goal, the Next Trust will build upon the foundation established through multi-faceted efforts and campaigns to save endangered and underutilized historic places across America, our core collection of historic sites, preservation successes with our statewide and local partners, and strategic partnerships by Trust programs such as the Historic Hotels of America.
2. **Revitalize Communities** – *The National Trust expands its dedication to use preservation, through increased training and knowledge, to revitalize communities and neighborhoods, preserve our diverse national heritage, and save and reuse historic places.* The Next Trust work in communities will be energized, informed, and stimulated by the successes already established by the Main Street, Community Partners, and Preservation Development Initiative programs.
3. **Lead the Preservation Movement** – *The National Trust expands its leadership responsibilities through capacity building, education, advocacy, public policy and increased financial resources to advance preservation and build the movement.* In this leadership role, the Next Trust will work in partnership with – and in support of – preservation organizations at all levels.

The Big Ideas: Eight Strategic Initiatives

The *Next Trust’s Strategic Initiatives* – the "Big Ideas" for the future – will inspire our work and provide the strategic diagram for dramatically accelerating the work of preservation in the coming years. These ideas have emerged from considered analysis of identified and unmet needs of the preservation movement and realized and unrealized potential of the National Trust for Historic Preservation.

***1. INSTILL PRESERVATION OF OUR HISTORIC AND CULTURAL HERITAGE AS A
CORE VALUE IN THE AMERICAN PEOPLE***

Vision: The Next Trust will make it possible for people of all ages to experience – in positive ways – our diverse national heritage. We will demonstrate the relevance of preservation to the quality of life in America and help Americans of all ages recognize how the stories of our heritage connect us to one another over time and space. Through historic places and communities, we will represent the full diversity of our national heritage.

Need: When we identify ourselves as "Americans" with a sense of pride and purpose, we give voice to the value of preservation as citizens of our nation. When 9/11 shocked and unsettled the nation, pride of place and purpose suddenly emerged as real and living in each of us. From the overwhelming sense of national and personal loss, came the irrefutable knowledge that place and history matter and must be protected and celebrated. More and more people are embracing the preservation ethic in America, but the preservation movement must commit to the common goal of building a powerful and impassioned preservation movement.

Steps: To instill preservation of our historic and cultural heritage as a core value in the American people, the National Trust will reach out to Americans of all ages, greatly expanding the universe of places and people associated with preservation and the National Trust. The Next Trust's programs, staff, volunteers, communications, and partnerships will come together to engage Americans with the stories of our people and the places where history happened and continues to unfold in their contemporary communities.

- We will build upon the *History Is in Our Hands* PSA campaign begun in 2003 with the Ad Council and more than 60 local and statewide partners, to teach Americans that losing landmarks affects us all in very personal ways.
- Media partnerships and corporate sponsorships – such as the Home and Garden Television (HGTV) *Restore America: A Salute to Preservation* campaign and our partnership around the *11 Most Endangered Historic Places* listing with The History Channel – will be cultivated and expanded to reach scores of new Americans.
- Heritage Education - A central priority will be the creation and application of educational partnerships designed to complement the educational work underway on the local level and instill a deep and lifelong learning commitment to the preservation ethic in Americans of all ages. Just as deliberate educational activities have had a lasting impact upon the conservation movement, so the National Trust calls for preservation-related educational efforts directed toward all Americans.

2. *ENGAGE ONE MILLION PEOPLE IN PRESERVATION*

Vision: Over the next five years, the National Trust will engage at least one million constituents in preservation, redefining how individuals, organizations, and groups connect to the Trust and the greater preservation movement. We will make sure that preservation constituents across the nation know the many ways that preservation touches their everyday lives. The Next Trust will approach people through a customer lens, making it possible to more easily connect to preservation, through the website, through *Preservation* magazine, through the stories of preservation at historic places across the nation.

Need: Local, regional and national preservationists across the nation work tirelessly to ensure that our national treasures are preserved, revitalized and reused for generations to come. And yet, as membership in the National Trust remains static and collaborative opportunities to engage more people in preservation are overlooked, historic places and communities are lost forever. The preservation movement and the National Trust can reverse this trend by working together to increase exponentially the numbers of people who recognize preservation in their lives and who are galvanized through a powerful national force to protect, revitalize and reuse America's irreplaceable treasures.

Steps: The National Trust will work to engage people in preservation through a host of new strategies. We will complement our traditional membership model with a customer-driven approach designed to attract individuals through their specific interest areas – homeowners, travelers, educators, developers, and more. As people discover the presence and relevance of preservation in their daily lives, the preservation ethic will *naturally* deepen and involvement in preservation at the local, regional and national levels will expand to advance our work.

- We will leverage our activities across the nation to save historic places and revitalize communities to reach new constituents and new members. Whether through high profile actions such as the 2003 purchase of the Farnsworth House, the annual listing of America's *11 Most Endangered Historic Places*, or endeavors to revitalize urban and rural communities, the Next Trust will engage a broader public in the process and outcomes of preservation.
- We will work with existing and new partners to bring increased value to preservation, drawing upon a range of interests – homeownership, travel, community revitalization – to build loyalty, save places, revitalize communities and increase individual financial support of preservation and the National Trust.
- Plans for saving historic places, revitalizing communities and leading the movement in the Next Trust will include specific and measurable strategies to engage more people through technology and a "customer" oriented approach to services and benefits.

3. GREATLY EXPAND THE NUMBER AND DIVERSITY OF HISTORIC PLACES ASSOCIATED WITH THE NATIONAL TRUST

Vision: The National Trust will make preservation more relevant, accessible, and cherished by the American people by letting them know where preservation is in action and where it has already had – and will continue to have – an effect. We will expand the visibility of the Trust and preservation through increased direct associations with places and communities in every state and region.

Need: Over two and one-half centuries, our young and prosperous nation has evidenced a remarkable ability to discard important elements of our physical heritage – some of it created hundreds of years before the nation's founding – often with indifference and disregard to their meaning or true worth. For preservation to thrive in this country, people must be able to recognize its impact on the ground – in their schools, their urban and rural landscapes, and in the quality of their daily life. The Next Trust, as the national leader of the preservation movement, will leverage the emerging preservation ethic to save more places and tell the stories of our heritage and the people who enliven our collective past. In so doing, the full meaning and relevance of preservation to everyday life will be understood by more people who, as a result, will become willing advocates for the work of preservation.

Steps: The Next Trust will become more widely recognized, continuing to strengthen our role in saving diverse historic places, and building practical and accessible opportunities for hands-on involvement in preservation and the work of the National Trust.

- The National Trust will leverage branding, technology and partnerships to demonstrate more accurately the breadth of preservation's influence and relevance in the lives of all Americans. We will tell the stories of real people and real places to connect Americans to one another and to the national preservation movement.
- From Historic Hotels of America to the Trust's core collection of historic sites, from historic neighborhood schools to landmark buildings, from sacred sites to main streets and rural communities, the National Trust will ensure that all Americans can experience the stories of our diverse national heritage. Through branding and special heritage initiatives at sites, places, communities and main streets, the Next Trust will directly associate preservation's landmarks to the National Trust and communicate the full relevance of preservation's legacy to the quality of life in America.
- The National Trust will employ a range of strategies for accelerating our work: financial investments, the annual listing of America's *11 Most Endangered Historic Places*, interventions by our Regional Offices, legal advocacy through the Legal Defense Fund, and preservation initiatives of national significance. These and other high-profile efforts will demonstrate – on the ground in real time and in real communities – preservation's importance, presence and continuing relevance to everyday life.

4. BE THE NATIONAL LEADER AND ADVOCATE FOR THE PRESERVATION ETHIC AS A TOOL FOR COMMUNITY REVITALIZATION

Vision: Through productive partnerships, we will leverage preservation's mission-driven tools – leadership, education, advocacy and resources – to strengthen and advance the work to revitalize communities, save buildings and redefine places for contemporary purposes. Preservation will be understood as a "must have" tool for successful revitalization of neighborhoods and main streets in rural, suburban and urban communities across the nation.

Need: The National Trust's commitment to the preservation ethic makes us an ideal catalyst for community revitalization and a vital partner in stimulating the adaptive reuse and rehabilitation of older buildings to safeguard the integrity of neighborhoods. Rural and smaller communities and urban centers alike continue to suffer from the devastating losses of unchecked sprawl and development. With so much at risk, the National Trust sees an urgent need to take responsibility for complementing, deepening and accelerating community revitalization efforts nationwide – quickly, before yet another irreplaceable piece of our built heritage is lost forever.

Steps: Through a holistic approach, the Next Trust will commit the leadership, resources, and innovation necessary to demonstrate preservation's role as an essential tool for community revitalization. We welcome the operational changes necessary to position the Next Trust to bring preservation into the mainstream of revitalization.

- We will deliver positive preservation expertise and a sound financial approach for healthy, sustainable preservation work in communities and neighborhoods across America. We will reach more people through a broadened network of partnerships and a stronger network of preservation services. At the same time, we will deepen our strategic work in select communities where our direct service expertise can have a significant and far-reaching impact.
- The National Trust will work in every region of the country with partners and investors to curb unchecked sprawl and protect our nation's heritage of historic open spaces.
- Our comprehensive Agenda for Older and Historic Housing in America will build greater capacity for housing providers and consumers to understand the value of older and historic housing, and for public and private sector agencies to employ preservation as a community and neighborhood development tool.

5. LAUNCH THE NATIONAL TRUST INSTITUTE TO ADVANCE KNOWLEDGE AND EXPERTISE IN PRESERVATION

Vision: The National Trust Institute will become the country's most far-reaching and respected preservation-based research and training enterprise for extending knowledge and expertise in preservation. Through research and training, the National Trust Institute will support the case that preservation makes good economic sense and contributes to the quality of life in America. We will conclusively shift the debate about preservation and accelerate preservation's impact at the local, state and national levels.

Need: Scant research exists to support the premise that preservation is a cost-effective and essential tool for revitalizing America's rural, urban and suburban communities and for protecting and reusing her historic buildings. Nor is there any central clearinghouse that monitors, collects and analyzes preservation-related research. This significantly weakens the case for preservation at the local, state and national levels. The National Trust Institute will equip real estate practitioners, policy makers and the leaders of our cities and states with the tools and the knowledge to make the preservation case.

Steps: Through a compelling requirement for rigorous training and analysis of such areas as housing, heritage tourism, new construction, emerging trends, infill issues, demographics and the economic implications, the Next Trust will strengthen the case for preservation in America.

- A central priority will be the creation and application of preservation education partnerships and products designed to instill in Americans of all ages a deep – and lifelong – commitment to the preservation ethic. Working in tandem with key partners as well as independently, the National Trust will advance an entrepreneurial approach, fostering innovation, creativity and synergy between preservation and real estate for students and fellows.
- Through the institute's think tank component, the Next Trust will conduct and commission research on a range of topics directly affecting preservation, including public policy, planning and zoning to quality of life issues and the role of diversity and culture in revitalization.
- The training arm of the institute will take fellows (either individually or through an organization) into the classroom and out on preservation-related real estate job. Practical experiential knowledge will make it possible for Trust fellows and students across the country to broaden their understanding and appreciation of preservation and to document and deliver best practices and lessons learned.

6. ENACT NEW FEDERAL PRESERVATION INCENTIVES TO REVITALIZE AMERICA'S OLDER BUILDINGS FOR HOUSING

Vision: As the national leader and advocate for the preservation ethic in community revitalization, the Next Trust will leverage its national standing and preservation's unique *sense of place* to achieve preservation advocacy goals. We will demonstrate how preservation of older buildings is a major part of the solution for addressing America's housing problems and overcoming the struggles of America's older communities and neighborhoods.

Need: For communities to have real meaning they must protect their roots – roots that are found in the physical reality of buildings that contain the heritage and the hearts of our people. Many communities are experiencing problems with affordable housing, which drives some people to move outside of many towns, creating new traffic, sprawl and workplace availability issues. The advocacy work of preservation now and in the future must be committed to fostering healthy communities and neighborhoods – places both large and small that we consider "home" and that provide continuity and connection between generations of Americans.

Steps: The Next Trust will release the powerful energy at the intersection between preservation and community revitalization and address the challenges at hand.

- The Trust will work with statewides and local preservation partners and others to forward federal preservation incentives targeted at revitalizing older buildings for housing, leveraging new resources to address the threats to the sense of place that defines rural and urban centers across the nation.
- National preservation incentives will make it possible to pursue community reinvestment strategies that simultaneously leverage older buildings and preservation's cultural heritage to revitalize communities and address the alarming shortage of affordable housing in America.
- Through advocacy and lobbying efforts, the National Trust will engage a broad range of individuals in preservation and become a powerful rallying force for all preservationists and others who recognize the relevance of preservation to their lives.

7. CREATE THE NATIONAL ENDOWMENT FOR PRESERVATION

Vision: By capitalizing upon the National Trust's unique organizational potential to become the major financial intermediary for preservation and preservation-based community revitalization in America, the National Endowment for Preservation will become the nation's largest nonprofit financial resource for preservation to protect, preserve and revitalize our cultural heritage.

Need: Historic preservation in the United States has *never* been adequately funded. Thousands upon thousands of significant buildings and places have been lost and as many neighborhoods have been destroyed. The National Trust will address this challenge long-term by creating the National Endowment for Preservation.

Steps: The Next Trust will assemble financial resources adequate to support critical preservation work at the local, state and national levels; advance the research and training to make the case for preservation; and intervene – with thoughtfulness and immediacy – when our heritage is at risk.

- The National Trust will leverage its standing as the national leader of preservation to amass an ultimate source of significant long-term sustainable private/public funds to address preservation needs for capitalization on a national, regional and local basis.
- Through the Endowment, the Trust will better serve preservation advocates across the nation as a leader and partner in addressing the ongoing threats to our national heritage.
- The Endowment will make it possible for the Trust to be responsive to its customers and increasingly dependable in its role as a grant maker to preservationists nationwide. Through enhanced resources and capacity, the Trust will positively influence the quality of work undertaken by preservationists and the success rates of local and regional preservation projects.

8. CONTINUE THE JOURNEY TO FINANCIAL INDEPENDENCE

Vision: The National Trust will broaden and strengthen its financial and organizational capacity, building upon the successes of the past several years to solidify and expand its financial operating base to meet capitalization and endowment needs.

Need: The National Trust is under-capitalized and its operations are significantly stretched. To be successful in affecting greater results in preservation and truly lead a national movement, the National Trust must build organizational and financial capacity at home and in the field. From a position of strength and a readiness to act, the Next Trust will intervene on its own behalf and in partnership with others when important elements of our cultural heritage are imperiled.

Steps: The organization's financial and operating plans and processes will be used to effectively meet programmatic objectives and to integrate work across departments

- To realize our full organizational capacity, the Next Trust commits to deliberate Cross-Trust Alignment, accelerating the work of preservation through a disciplined approach that identifies clear priorities, practices flexibility in organizational design, and leverages programmatic and entrepreneurial partnerships. By aligning resources behind the priorities of strategic plan, the Next Trust will operate as an effective, creative, collaborative and innovative organization.
- The Next Trust will expand the financial resources available to support its ongoing operating needs, with particular emphasis on pursuing increased net revenues through membership and annual giving as well as long-term stability through planned giving. To that end, the Next Trust will begin preparation for a second comprehensive campaign, with special emphasis on building unrestricted endowment income.
- The Next Trust will deliver on its potential to build business income, assessing existing activities for their earned income potential and identifying creative new business opportunities for generating significant earned income through mission-driven endeavors that draw upon organizational assets and strengths.

Implementing the Vision: Key Activities, Outputs, and Outcomes

This strategic plan presents a blueprint for the Next Trust, detailing the pathways for building on our recent successes to realize very focused and tangible outcomes. It is only a beginning. Full implementation will require effective monitoring, adherence to key benchmarks, and meaningful performance review throughout the organization.

Key Benchmarks

Within the next six months, several tasks focused on alignment and organization must be completed:

- A comprehensive review of the organizational structure of the Trust as viewed against the Next Trust vision
- Convening of cross-Trust teams to construct implementation plans for the big ideas and identify important partnerships for implementation
- A review of current financial realities, the financial needs expressed through the Next Trust vision and the allocation of resources as viewed against the Next Trust vision
- Preparation of an internal and external communications and branding strategy to align with the Next Trust vision

Key tasks for both 6-month and long-term periods, identifying outputs and outcomes from those activities, have been drafted.

Financial Implications

A full-scale review of the current financial realities as well as the current allocation of costs will provide direction for future funding priorities and budgeting decisions under the Next Trust plan. The vision outlined in the plan suggests the following:

- Improved coordination – and perhaps additional resources – will be needed in the communications programs of the Trust. Understanding all the ways the Trust currently communicates to its constituencies – and the costs of those communications – is a first step to determining our financial needs.
- Continued financial support is required for the remaining two years of the PSA campaign.
- Continued growth of our media partnerships is imperative to realize the vision.

- Membership must remain a revenue generator for the Trust; all elements of the organization must be engaged in the outreach to one million Americans.
- There will be costs associated with the branding initiative envisioned as the Trust expands the number and diversity of historic places associated with the Trust.
- The McKinsey study to reorganize the Community Revitalization Department has identified a \$1.8 million funding need for the 5-year transition period before the department is able to achieve “steady state” status and resume self-sufficiency.
- Resources within the Trust will require reallocation to align programs and service delivery with the community revitalization vision.
- Coordination of current training and research activities can form the foundation for the National Trust Institute, but significant new fundraising and partnerships will be necessary to achieve the full vision.
- Resources for advocacy should include support from programs (e.g., community revitalization) with large advocacy agendas.
- This vision for the Trust recognizes the need for the launch of a major capital campaign within the next 3-5 years. An increased investment in planned giving has the potential to produce significant new gifts and help fund the National Endowment for Preservation.
- Continued funding will be required to support the Statewide and Local Partners program and matching challenge grants.
- Continued growth of unrestricted annual funding will be crucial to the financial health of the organization and relates directly to the engagement of one million Americans.

The Five-Year Financial Plan

The Trust’s current five year financial plan was a tool that guided us as we transitioned from federal funding. The plan has helped to keep us focused on our expectations for growth of unrestricted funding sources, the allocation of the operational use of those unrestricted funds, and the expectations for programs and sites that already were or should become financially self-sufficient.

The plan, flexible and adapted annually, has provided a road map as we replaced federal funding with increased revenues from endowment, fundraising, membership and business activities.

To realize the Next Trust vision, we must begin to develop financial plans that continue to serve the original purpose of the five-year financial plan but also to guide the growth of areas supported by restricted revenue sources. The ambitions of the Next Trust vision must be factored into our financial plans. We must also begin to fully attribute general administrative overhead costs to all Trust programs so that as those programs grow, their added administrative burden is factored into our financial plans.

Above all, the Trust's financial plan must reflect the vision of the Next Trust through the allocation of resources expressed by the financial plan – both unrestricted and restricted.

Evaluation Plan

The evaluation plan for the Next Trust Strategic Plan will serve as a tool for measuring progress toward desired results. The evaluation plan activities are directly connected to both quantifiable outputs and qualitative outcomes. In many ways the plan will provide the management team and staff with a benchmark tool as the National Trust progresses toward goals over the next five years. Accompanying the plan will be a progress report construct that will make it possible to ascertain, over the five-year period, how well we are progressing toward goals. The progress report will make it possible for the Trust management and leadership to make the needed midcourse modifications in order to continue on a path toward the specified outputs and outcomes.

(The vision for the Next Trust – as presented in this Strategic Plan – was unanimously approved by the Board of Trustees of the National Trust on February 9, 2004.)