

Preservation Connecticut

Strategic Plan

2025 – 2030

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INTRODUCTION | Preservation Connecticut at 50 years

Preservation Connecticut's (PCT) mission to preserve, protect, and promote historic resources remains as relevant and vital today as during its founding in 1975. In its new, five-year strategic plan, PCT recommits to three fundamental goals. To: **Make a Big Impact; Engage and Inspire;** and **Build a Strong and Sustainable Organization.** It foresees the next 50 years as rooted in traditional practices, while undertaking bolder more complicated and more consequential initiatives. PCT will continue to save individual buildings and sites, but it will also take on larger scale work with larger scale implications. Through its work, it will demonstrate that the preservation of historic places is both a worthwhile goal in its own right and can be an essential tactic in addressing Connecticut's contemporary challenges including development pressures, climate change, housing affordability, and widening gaps in wealth and opportunity. Individuals, donors, and potential supporters of all kinds will see and understand how the work of PCT makes a difference in their communities.

PCT is thoroughly positioned for success. It has distinguished itself as one of the most high-performing, professionally staffed, and effective statewide preservation organizations in the country. Its well-established circuit rider program, granting initiatives, survey work, and educational programs have led to the protection and stewardship of thousands of resources across the state with beneficial consequences for the economic, cultural, and aesthetic vitality of hundreds of communities. It has also proven to be a determined and creative statewide voice, securing substantial investments and policy support for preservation and heritage activities of all kinds.

PCT's 2025-2030 strategic plan recommits to three fundamental **goals**, reimagines and redefines its **mission** toward more expansive ends and articulates a series of **principles** to shape and guide its work. It includes a series of **strategic approaches** that will inform its workplan and calls out four **strategic priorities** intended to shape and focus its work.

The Planning Process

PCT undertook a strategic planning process with the goal of reviewing and refreshing its current strategic plan and considering how it might better represent and serve the full and diverse range of communities and resources in the state. PCT has already begun to operationalize some of these intentions. Notably, the Community Investment Fund 2030 "Washington Park Community Preservation Project" in Bridgeport represents a dynamic shift in the nature and scale of PCT's preservation program. It commits millions of dollars and brings 50 years of hard-won preservation expertise to transforming an historically underserved and disinvested community. Traditional preservation practice, in this case critical building repairs and improvements at five religious properties, is undertaken at an

unprecedented scale. Here, the act of building repair and restoration secures and expands the building's community-serving functions. It demonstrates preservation's power to not only save buildings but also restore community fabric, vitality, and pride.

The strategic plan was guided by a Project Advisory Committee (PAC) made up of board members, staff, and community leaders. Committee members took part in two in-person work sessions and two virtual discussions. They identified traditional and non-traditional stakeholders, reviewed findings, tested assumptions, and sourced new ideas, approaches, and action items.

Importantly, PAC members took an active role in conducting the plan's equity audit. The audit assessed eight of PCT's projects and programs with an eye toward determining if they were inherently biased, inequitable, or exclusionary. The findings of the audit are detailed in an accompanying report but, in general, the audit found that PCT has made considerable progress toward making sure its projects and programs serve all residents of Connecticut. In practice, this has meant developing new strategies and approaches to identify and protect intangible, lost, or purposefully erased resources, or those which, over time, have lost their architectural integrity as defined by state and federal criteria. It has also resulted in projects, such as the Washington Park Project, that bring expertise and resources to areas that have historically seen disinvestment and loss of historic resources. These new aspirations are also attracting more representative leadership and new partnerships. The findings of the audit suggest areas for improvement and serve to inspire many of the plan's guiding principles and its action items.

STRATEGIC PLAN PROJECT ADVISORY COMMITTEE

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GOALS | What We Aim to Accomplish

In 2018, PCT established three overarching goals for its work. With minor refinement, these goals remain relevant today and offer a compelling call to action.

Make a Big Impact

PCT's work will not only preserve places, it will change them. The act of repairing a building, or stewarding a landscape, or bringing history to life brings opportunity, economic vitality, health, and pride to a community. PCT's preservation work is essential and inextricably linked to larger community successes.

Engage and Inspire

The work of preservation is not PCT's alone. Residents, elected officials, and community-serving organizations of all kinds need to be partners. PCT uses every preservation project as an opportunity to make connections, build excitement, and give people the tools and resources they need to save the places they care about.

Build a Strong and Sustainable Organization

Preservation begins at home. In order to achieve its objectives, PCT will prioritize the work of raising money, attracting and nurturing staff and volunteers, building and stewarding relationships, and putting in place policies and practices that sustain the organization for the next 50 years.

MISSION | What We Do

We enhance and sustain the culture and vitality of Connecticut's varied communities by preserving, protecting, and promoting historic places which embody the stories of our shared past and enrich our shared future.

GUIDING PRINCIPLES | Who We Are

PCT developed the following principles to ground and guide its decision making and planning. These principles assert the organization's core beliefs and its aims and methods. The strategies and strategic priorities that follow put these principles into action and ensure that PCT conducts its work in ways that honor and advance these principles.

PCT Plays a Unique and Unmatched Role

PCT has been, and remains, the leading independent voice for historic preservation in the state. It is unapologetically and exclusively focused on preserving Connecticut's rich history and building the state's successful and sustainable future. It takes an expansive view of preservation that looks beyond individual resources and traditional partners. While it works closely with state and local government, it is free to act outside the official regulatory structure. It test-drives new approaches, brings resources to the table, models best practices, and endeavors to be nimble and responsive to evolving preservation issues in the state.

PCT's Work is Both Statewide and Grassroots

PCT's mission requires it to have the capacity and competency to work at various scales. It is a sophisticated author and advocate of state-level policy that protects and incentivizes historic preservation. At the same time, its staff works directly with property owners, community activists, and local governments to save the places they care about most. This dual role is powerful. PCT understands and often anticipates evolving needs and can work with state officials and agencies and other partners to address them. It can also serve to connect community members with programs and resources that can support their efforts.

PCT Tells the Full Story

PCT aspires to identify, protect, and celebrate history that is fully representative of, and fully benefits all Connecticut residents. It acknowledges that its work and those in planning, architecture, and related fields have traditionally privileged white colonial history ahead of other groups. PCT will work to improve its practices, modify evaluation criteria, and build relationships that serve all histories, all communities, and all places.

PCT Works in Partnership

The work of preservation is complex and intersectional. To be successful, PCT must take the time to identify, build, and steward relationships. It will continue its long-standing collaboration with the Connecticut State Historic Preservation Office, Connecticut Preservation Action, and other traditional partners, while at the same time, seeking out new partners especially in the fields of community development, housing, environmental justice, and climate adaptation.

PCT Supports and Nurtures its Staff and Volunteers

PCT is committed to organizational practices that support the wellbeing and success of staff, volunteers, and partners. It offers proper compensation, sets

reasonable goals and performance measures, offers professional development and health and welfare opportunities, defines clear lines for advancement, and sets aside time for program evaluation.

PCT's Work is Transformative

At scale, historic preservation can play a critical role in addressing contemporary challenges. PCT will continue its work to preserve individual buildings and sites, but at the same time take advantage of opportunities to aggregate its resources, expertise, funding, and time for greater influence and impact. It will learn from its Washington Park Project and develop policies and approaches to guide its major initiatives going forward.

STRATEGIC APPROACHES | How We Organize Our Work

These 2025-2030 strategic approaches roughly align with those contained in the previous strategic plan. They represent the ways PCT seeks to accomplish its goals: Make a Big Impact, Engage and Inspire, and Build a Strong and Sustainable Organization. Each also contains recommended action items to be taken during the 2025-2030 strategic plan time frame.

Educate and Advocate

Engage and Inspire, Make a Big Impact

PCT advocates for policies and programs that support historic preservation. It offers education programming that builds the competency of individuals, property owners, commissions, elected officials, and others to save historic resources.

- For more than 40 years, Connecticut Preservation Action and PCT have worked in partnership to advocate for historic preservation in the state. As the legislative landscape and preservation's aims and methods evolve, PCT seeks to review and update the collaboration to make sure it is working effectively and is serving both organization's needs.
- Continue to be part of the Connecticut Community Investment Act Coalition and seek other alliances to advance common purposes such as affordable housing, environmental justice, and climate mitigation.
- Use larger-scale projects such as Washington Park as models for partnering on local and state policy efforts that directly benefit the project and future endeavors. These may be alternative funding sources, new regulatory approaches, and the creation of other incentives.

- Review existing educational and training efforts and consider more proactive ones with the aim of increasing their scale and reach. Minimize as much as possible 1:1 training and education.

Fund Preservation

Build a Strong and Sustainable Organization, Make a Big Impact

PCT will continue to identify funding streams that can be used to enhance and make more effective the technical assistance and expertise it already brings to projects.

- Capitalize on the 50th anniversary to plan and executive a funding initiative that provides significant discretionary support to fuel the goals and objectives of the strategic plan.
- Consider ways to deploy current grant programs to align with strategic priorities. Seek additional or matching funds that might increase the power of these grant pools.
- Seek larger scale funding for larger scale projects such as the Washington Park Project.
- Investigate opportunities to serve as a re-granter of purpose-specific funding such as energy retrofits, underrepresented histories, façade/commercial projects when connected with PCT's strategic priorities.

Provide Technical Assistance and Information

Engage and Inspire, Make a Big Impact

The circuit rider program along with easements monitoring, survey and documentation, and government consultation form the core of PCT's preservation program. They bring invaluable expertise, resources, and knowledge to the work of saving places.

- Use SHPO reporting requirements and the data it yields to re-evaluate the circuit rider program, determine actual costs, quantify and measure success, and develop a case statement for expansion and/or additional funding if warranted.
- Increase the number of circuit riders or otherwise deploy circuit riders more effectively at different scales.
- Be more strategic in deploying surveys and documentation so they support other organizational objectives.

Engage the Public

Engage and Inspire, Make a Big Impact, Build a Strong and Sustainable Organization

With a special emphasis on new outreach opportunities and channels, PCT will continue to evolve its communications plan to reach audiences that are not currently hearing from PCT. Its goal is to inspire wide and diverse support for preservation generally and PCT specifically.

- Continue to build out current communications plan.
- Capitalize on major initiatives to meet new audiences.

Recruit and Nurture a High Performing Board and Staff

Build a Strong and Sustainable Organization

PCT understands the value of its staff, board, and volunteers. It works to support and nurture these individuals and to recruit an increasingly diverse and more representative community of individuals to support its work.

- Develop a Comprehensive Board and Staff Recruitment and Retention Plan
- Map out a timeline and next steps for capacity building that aligns with strategic objectives.

STRATEGIC PRIORITIES | Putting the Principles in Action

PCT is proud of its 50 years of achievement. It has built out an effective and diverse program of preservation activities and gained immense expertise and capacity to identify, protect, and steward historic places. In the coming years, in addition to its ongoing efforts as described in Strategic Approaches, PCT prioritizes the following five initiatives. Each brings focus and intentionality to PCT's work, advances its mission, and positions PCT to attract support and funding for the next five years.

1. Use the Washington Park Community Preservation Project as model/blueprint for how to grow PCT's capacity to use preservation to address larger-scale community challenges and to build a more sustainable organization.

Map out a workplan, as defined in Appendix C, that goes far beyond capital improvements to leverage the project to meet the organization's overarching goals to: Make a Big Impact; Engage and Inspire; and Build a Strong and Sustainable Organization.

At a minimum, workplan elements should include:

- Plan to engage with and convene stakeholders and potential allies at all levels during and after the project.
- Communications and press strategy.
- Comprehensive fundraising strategy to meet current and future needs including developing prospect list and case statement.
- Identification and cultivation of new partners.
- Documentation of tasks and activities with assessment of what worked and what didn't. Create a timeline for key check-ins and opportunities for reflection and visioning.
- Consideration of opportunities to bring other programs to bear on the project as appropriate such as deploying or adding circuit riders, and using survey, grants, easements, training, and education programs to support the work.
- Develop ways to use the project to engage a larger constituency for historic preservation.

2. Proactively identify future opportunities to use historic preservation to address contemporary challenges and expand the reach and impact of PCT.

Building on lessons learned at Washington Park, develop criteria and a selection process for identifying future initiatives that fall outside the scope of the organization's regular work plan. This is defined in Appendix D and includes a reasonable and achievable timeline and potential funding sources and partners. As with the Washington Park Project, major initiatives should address contemporary challenges in the Connecticut and should serve to advance the organization's overarching goals to: Make a Big Impact; Engage and Inspire; and Build a Strong and Sustainable Organization.

3. Expand PCT's criteria, definitions, and approaches to be better positioned to engage and serve all communities and all histories and to make the benefits of historic preservation accessible to all.

The equity audit, appendix A, conducted by the PAC as part of the strategic planning process yielded several ways that PCT might address instances of inequity and exclusion in its work. These include a set of principles to guide the work as well as potential next steps in beginning to remedy the deficiencies identified in the report. These should be reviewed on a program-by-program basis by staff and refined and formally acted on as appropriate.

4. Plan for staff realignment and expansion to meet the growing needs of the organization and develop a board and staff recruitment and retention plan

To achieve its ambitions, PCT requires a board and staff that are fully representative of Connecticut's diverse constituency and who bring the expertise and experience needed to achieve its ambitious objectives. PCT should develop a comprehensive board and staff recruitment and retention plan to provide a blueprint for meeting, cultivating, acquiring, and nurturing future board members and staff, especially those that are more fully representative. Such a plan should include:

- Goals and objectives statement for why and who PCT aims to recruit for its board and staff.
- A board and staff recruitment and cultivation strategy that includes non-traditional audiences, outlets, and methods.
- Robust board and staff orientation.
- Engagement plan for board members including appropriate assignments, regular check-ins, and ways to chart progress and satisfaction.
- A staff compensation philosophy that sets and justifies pay and a range of benefits that recognizes and supports individuals.
- Articulation of roles and responsibilities for staff, detail how performance is measured, clear lines for advancement.
- Development of

This board and staff recruitment plan will demonstrate to funders and partners PCT's commitment to equitable and inclusive practices. It will also provide a coherent and defensible compensation philosophy that can be used to articulate and advance funding requests. As a first step, Appendix E, outlines staff capacity required to carry out the objectives of this plan.

5. Build a fundraising plan around these strategic priorities and the 50th anniversary

Energy around the Washington Park Project, PCT's 50th anniversary, and this strategic plan can be used to generate enthusiasm among current supporters and to identify and secure new funding for PCT. PCT will plan and execute a funding initiative that provides significant discretionary support to fuel the goals and objectives of the strategic plan. Initial talking points and approaches are suggested in Appendix F.

PRESERVATION CONNECTICUT STRATEGIC PLAN

Equity Audit Report

INTRODUCTION

Inserting Equity and Inclusion into the Strategic Planning Process

Preservation Connecticut (PCT) is undertaking a strategic planning process with the goal of reviewing and refreshing its current strategic plan and infusing diversity, equity, and inclusion into its policies, programs, and work plan. Over the past several years, PCT has grown more intentional in its efforts to recognize and address instances where historic preservation policies or approaches have contributed to systemic racial inequities and exclusion. It is now taking a conscientious step toward examining its own organizational responsibilities with the conduct of an equity audit.

The audit assessed eight of PCT's projects and programs with an eye toward determining if they were inherently biased, inequitable, or exclusionary. The findings of the audit are detailed in this report and are informing the outcomes and recommendations of the strategic plan.

The findings of the equity audit challenge the organization to affirm its commitment to a more inclusive kind of historic preservation, and, in so doing, build a stronger, more effective, and more sustainable organization.

AUDIT METHODOLOGY AND AREAS INVESTIGATED

An Assessment of Select PCT's Projects and Programs

The Project Advisory Committee (PAC) selected eight current activities of PCT to be audited. Working with staff, committee members posed a series of questions for each area and prepared a report based on the answers. The audit of each activity was not meant to be exhaustive, but rather an exercise in considering how PCT's activities might contribute, however unintentionally, to inequity, exclusion, and harm. Findings are summarized in the next section.

Audit Questions:

1. *When/ how was it established, what are its roots?*
2. *Who was it meant to serve, its aspirations?*
3. *Who does it actually serve, who benefits?*
4. *Who does it harm, how?*
5. *How do we reform?*
6. *What do we have to lose or gain by this change?*

Programs Audited:

- Advocacy
- Awards
- Circuit Rider Program
- Easements
- Events
- Maintenance and Repair Grants
- Surveys
- 1772 Grants

AUDIT FINDINGS**Progress Toward Equity with Many Opportunities for Reform**

PCT was founded in 1975 to “preserve, protect, and promote the buildings, sites, and landscapes that contribute to the heritage and vitality of Connecticut communities.” Like many preservation organizations of its vintage, and mirroring the concerns and approaches of the National Park Service (NPS) and, by extension, the State Historic Preservation Office (SHPO), this meant focusing primarily on architectural resources associated with Connecticut’s majority white, settler heritage. Not surprisingly, for most of its existence, its volunteer leadership, staff, and membership have also been representative of the state’s majority white culture. However, this is changing. In recent years, the organization has sought to “preserve, protect, and promote” all histories associated with Connecticut’s past and a broader range of historic and cultural resources. This has meant trying to develop new strategies and approaches to identify and protect intangible, lost, or purposefully erased resources, or those which, over time, have lost their architectural integrity as defined by state and federal criteria. These new aspirations are also attracting more representative leadership and new partnerships.

Overall, the equity audit found that while there is a very real commitment to engaging in projects and programs that are fully representative, instances of bias and exclusion linger, and efforts at reform are hampered by both internal and external forces.

Detailed Findings

- Although nascent, PCT has undertaken projects that preserve and protect resources associated with contemporary and historic communities of color and with other non-traditional constituencies. Most notable of these are the Washington Park Community Preservation Project and Maintenance and Repair Grants for Religious Properties. These efforts must be carefully stewarded with continued focus on relationship building, flexible approaches, and respect for the community’s own knowledge and priorities.
- In spite of these examples, PCT programs and projects, by and large, continue to focus on architectural excellence and a conventional narrative of the state’s historical evolution. For example, there is little or no recognition of the state’s substantial indigenous history or contemporary indigenous culture. In addition, beyond storytelling, PCT has few resources – grants, regulatory protections, or other incentives – to save and steward intangible

resources. This limits its ability to include the full range of narratives that comprise the state's historic legacy. None of this is unexpected given that the programs and processes that govern many preservation activities, are similarly unable to deal with intangible heritage. PCT has found ways to work outside some of the constraints imposed by the NPS, SHPO, and some of its own funders and can continue to do so.

- PCT's on-the-ground initiatives including its Circuit Rider Program, local events such as Jane's Walk, and maintenance and repair grants have great potential to direct preservation investments – financial and otherwise – into previously underserved communities. However, the deployment of these resources is highly dependent on existing relationships. Many communities are not being served because they do not know about PCT or because they have a negative impression or mistrust of the organization's aims and methods. Conscientious, directed, and sustained engagement is required.
- In many areas of its work, PCT defaults to its closest allies and audiences and its traditional methods of program promotion and delivery. This limits its ability to reach new audiences, identify and protect a wider range of resources, or develop new and innovative partnerships. Similarly, its programs are often opportunistic. This is most notable in its survey work and some of its advocacy. While, in and of themselves, these efforts are worthwhile and serve conventional preservation objectives, they too are subject to the priorities and biases of partners and funders and tend not to be particularly inclusive of non-traditional histories and resources.
- While diversity, equity, and inclusion appear to be valued in selection for awards, grants, and some programming, it is not stated explicitly. PCT should consider whether its advantageous or disadvantageous to be more transparent about its priorities in this regard and why it has chosen to do so. A clearly defined and articulated position regarding diversity, equity, inclusion, and accessibility can assist PCT to focus and prioritize its activities to achieve those objectives.
- PCT's predominantly white staff limit its ability to connect with, understand, and address the issues facing indigenous people and communities of color. This may be a consequence of its own hiring and compensation practices, as well as an industry-wide dearth of diverse candidates. The unintended result, however, is the perpetuation of policies and approaches that may not be inclusive.

Audit Findings by Activity:

Advocacy

Advocacy has been a key activity of PCT since its founding in 1975. In 1980, it created CT Preservation Action to increase capacity and sophistication especially in lobbying efforts at the statehouse. The focus of PCT advocacy has traditionally been on turning back demolition and other threats and securing funding and pro-preservation policy. PCT also advocates for state legislation and policies out of self-interest especially as regards Community Investment Act funding. All of these are exceedingly worthwhile but they operate using conventional tools and

approaches and serve projects, organizations, and individuals with the wherewithal to understand and take advantage of the policies and programs being advanced. This can be seen as exclusionary. A greater consideration of how PCT advocates and/or supports advocacy at the local level including issues addressed by CT Conference of Municipalities could expand its reach and equity. PCT might also review the advocacy agendas of the Investment Act Coalition, CT Preservation Action, and other policy partners for their alignment with PCT's emerging commitment to DEI. It can seek out new partners as warranted.

Awards

The awards program offers an opportunity to celebrate both preservation projects and the people who advance preservation in the state. The Findlay, Jainschigg, and Griswold awards are specifically designed to highlight individuals and, in the case of Findlay, those under 35. Over time, PCT has recognized a range of projects, some associated with underrepresented history or communities. However, it is only in recent years that it has attempted to recognize a more representative group for individual achievement. This has proved to be challenging in no small measure because of the relative lack of diversity among professionals in the conventional areas of architecture, preservation, archeology and related fields that are eligible. Additional barriers are also found in the nomination process, its criteria and the nature of the awards ceremony itself. Currently, only members of PCT may nominate projects. Although the hope is that members would be made aware of outstanding individuals and projects of all kinds, the process is still subject to the biases and associations of a traditional stakeholder group that itself is not particularly diverse and inclusive. This holds true as well for the award juries. To remedy these deficiencies, PCT might consider opening up the nomination process and empaneling a less traditional set of jurors. An expanded and more diverse jury might also serve to help identify and steward more diverse nominations. PCT might also review selection criteria to be more widely applied and inclusive to both projects and individuals. All of this requires time and careful consideration of how we define "success" for preservation projects and what constitutes "leadership" and in what professions. However, it may yield surprising nominations and uncover new and interesting preservation initiatives and potential partners.

Circuit Rider Program

Modeled on a similar Vermont initiative, the Circuit Rider program was conceived as a way to deploy preservation assistance at the local level. In particular it was aimed at preventing demolition. Later the program was able to extend grants which made its work more consequential. At the same time, however, these grants were almost exclusively awarded to institutions or organizations who were in a position to apply for, act on, and administer the grants. While technical assistance is available to individuals and PCT offers a professional directory, it has proven more cost effective for the circuit riders to work with organizations, developers, and institutions rather than individuals. As with other PCT indicatives, the reach and impact of the Circuit Rider program is limited and may be viewed as somewhat exclusionary. Only those with established relationships with PCT or who have the knowledge and wherewithal to reach out benefit from the program. Potential projects and partnerships may be further stymied where there is lack of familiarity and even trust. Remedying some of the inequities of the program would require a substantial commitment of time and resources to building relationships and promoting the program in currently underserved communities perhaps going so far as to add

addition circuit riders. It might also require a reconsideration of how PCT defines historic preservation so that the circuit riders might involve themselves in a wider range of programs.

Easements

Property/deed restrictions have a long history but their evolution as an historic preservation tool is more recent. Fundamentally, an easement is used to protect a property from inappropriate future alterations. Property owners are inspired to establish an easement because they want to secure the future of the property and/or they are motivated by a tax incentive which compensates them for the property's presumed diminished real estate value. These types of easements are voluntary but it has also been the practice of some funders, including government agencies, to demand that easements be established as a way to protect the investments they have made in the property. Generally speaking, both property owners and the public benefit from the practice although the tax benefit only accrues to the owner at the time the easement was placed. Subsequent owners may feel constrained, even harmed by the restrictions it imposes. What is problematic and potentially inequitable and exclusionary is the nature of what properties receive easements and who benefits. Easements are typically attached to high style, high integrity places owned by individuals or institutions with enough tax liability to benefit from the tax deduction. For others, the easement may be imposed upon them as a requirement of grant funding but provides no additional tax relief. It may in effect increase the cost of maintenance and prevent future alterations or uses. The legal requirements for easements will not change, but PCT could promote better understanding of the value of easements among all types of property owner and champion maintenance and stewardship requirements that take into consideration values and associations beyond architectural integrity. It might also consider revisiting existing easements to determine their association with people, stories, and themes that were not recognized at the time of the easement determination.

Events

PCT hosts a wide range of annual events as well as several singular or occasional events. Their purposes vary but generally they are designed to: educate people about historic preservation approaches, projects, and outcomes; raise awareness about PCT and its work; engage the community; and recruit members. While most are open and accessible to everyone, some are restricted to members only, and/or have a fee. Their location, the time or nature of the event may also limit accessibility. And, while PCT tries to market them widely, it is dependent on distribution methods and audiences that are not fully inclusive. Those who do not know about the events, do not see the content as particularly relevant, or are unable to participate for the reasons named above cannot benefit from the programming. As a first step, PCT can revamp its current website to provide more concise and accessible descriptions of the events, their purposes, and value. It can also work deliberately and perhaps more effectively through partnerships to expand its promotional reach, find ways to reduce or eliminate fees, and develop content that may be more engaging.

Maintenance and Repair Grants

In 2017, PCT began using a portion of its state Community Investment Act allocation to create the Maintenance and Repair Grants for Religious Properties. Grants assist religious organizations, especially those serving traditionally underserved, economically challenged communities, to undertake much-needed, often expensive repair and maintenance activities. PCT has created a

relatively inclusive and equitable program that serves a geographically disbursed and somewhat diverse set of congregations. While perhaps unintentional, the program appears biased toward Christian and Jewish denominations in either traditionally white or black communities excluding other faith traditions. In addition, fewer grants have been extended to churches serving Latino, indigenous, refugee, or other minority communities regardless of their religious affiliations. This may be due in part to lack of PCT staff relationships with these communities. In addition, the requirement that the properties be historically designated or eligible for designations means that many properties may not be historic enough, architectural intact enough, or significant enough to be eligible in spite of the degree to which they contribute to their communities. PCT can continue to make the application process easier and more accessible including perhaps offering it in other languages and continuing to dedicate staff time to shepherding organizations through the process. It can use its circuit rider program to prioritize outreach to currently underserved communities. It might also consider amending or eliminating the requirement for historic designation. Removing the historic designation criteria may appear to some as a departure from traditional preservation practice. However, it might also be seen as the evolution of more inclusive and representative practice that acknowledges all histories, tangible and intangible.

Surveys

PCT does not have a survey program per se, rather it undertook surveys of particular historic resources as the need arose and funding was available. The first, prepared in 1993, compiled a complete listing of Town Greens. Subsequent surveys did the same for Barns, Creative Places, Mills and Olmsted Landscapes. The data from these formal historic resource surveys is now available through a link on PCT's website. In addition to becoming the basis for National and State Register nominations, the surveys were intended to document the scope and extent of existing assets around CT and presumably encourage their preservation and stewardship. While not harmful in their own right, the limited nature and scope of the work also limits its public benefit. PCT could use its survey expertise to uncover underrepresented histories and resources and promote their nomination to State and National Registers. PCT did participate in a survey of Greenbook sites in CT that yielded information that is now available on the National Greenbook Website. PCT might also revisit the existing surveys to see if inherent biases may have excluded certain sites. PCT would need to find new sources of funding if it were to undertake more intentional and PCT-directed survey work.

1772 Grants

For over 12 years, PCT has partnered with the 1772 Foundation to distribute maintenance and repair grants to nonprofit organizations. Initially these funds were primarily directed to small historical societies with modest budgets and no staff. This restricted their reach and benefit. In recent years, PCT, with the support of the 1772, began proactively soliciting grant applications from non-profits in urban areas. It hopes to continue these efforts by seeking better ways to advertise, promote and award these grants. With these changes, PCT expects to better reach previously underserved communities and build partnerships for continuing preservation activities.

RECOMMENDATIONS FOR DISCUSSION

A New Way of Working: Guiding Principles and Work that Needs to be Done.

The audit yielded several ways that PCT might address instances of inequity and exclusion in its work. These include a set of principles to guide the work as well as potential next steps in beginning to remedy the deficiencies identified in the report. Together these principles and action items offer a foundation upon which to build the strategic plan.

Guiding Principles

- PCT understands and embraces the role it can play in creating a more diverse, equitable, inclusive, and accessible community and is willing to alter its programs, policies, and projects toward these objectives.
- PCT aspires to deploy its resources in ways that are accessible to all and, where possible, in ways that remedy past inequities in terms of recognition, investment, and other benefits that accrue through historic preservation.
- PCT will review and amend its nominating procedures, grantmaking, and other practices to reduce barriers to participation. It will be transparent and honest about how its programs are organized, their goals and objectives, and any criteria that guides decision making.
- PCT will continue to evaluate its policies, programs, and projects for their contribution, positive or negative, to exclusion and inequity. It acknowledges that this work is generative and that it will need to take into account evolving standards of diversity, equity, inclusion, and accessibility as they apply to all heretofore marginalized communities. It will listen to and learn from these communities.
- PCT will demonstrate its commitment to equity and inclusion in its own hiring practices, board development, and program development.
- PCT will associate itself with organizations and individuals who are similarly committed to equity and inclusion and will look to and learn from those who are successfully advancing equity and inclusion agendas.

Proposed Action Items

- Formally, allocate time and resources to relationship and trust building activities that build the credibility of PCT among new constituencies.
- Clearly articulate PCT's commitment to diversity, equity, inclusion, and accessibility and why it is important in the historic preservation context. Use the guiding principles to establish a set of standards that can be used to hold the organization accountable to this commitment. Consider preparing a formal acknowledgment of the legacy of inequity and exclusion in traditional preservation practice. Include specific actions that move toward remediation and repair.

- As appropriate, amend current programs, policies, and projects to reflect these new commitments. Some examples:
 - A more inclusive professional directory.
 - Build on current communication plan to target more diverse audiences.
 - Revise current nominating process for awards and jury members.
 - Revisit guidelines for grants.
- Consider how to better deploy current programming and develop new initiatives that are intentionally and transparently directed at expanding PCT's work to new resource types, geographic areas and/or on new types of projects with the hope of cultivating new partnerships and increasing PCT's relevance to a more diverse audience.
- Consider foregoing activities that are inconsistent with PCT's principles and objectives. Be more strategic in the way PCT deploys its time and resources so that it may be more intentional and effective in advancing an equity agenda.
- Build organizational infrastructure including staff and administrative structures and form coalitions that continue the process of education around inequity and exclusion and as a way reinforce the commitment going forward.

External Assessment

INTRODUCTION

Understanding the Work of PCT in the Larger Community

Between May 6 and 14, 2024, I conducted 7 interviews with external stakeholders recommended by the Project Advisory Committee (PAC) and PCT Staff. These are organizations and individuals whose work and/or lived experience might offer a new way of looking at the work of PCT. In all cases, people spoke to me as representatives of their organizations but also, quite sincerely, as individuals. The interview process was by no means exhaustive, but it did raise many important issues, insights, and ideas that can inform the strategic plan. This assessment also draws on discussions at the April 5, 2024 PAC scoping session and a review of PCT related materials. The goal of this investigation is to:

- Look at PCT's work as part of the larger constituency of organizations working toward the common goal of building an equitable and thriving Connecticut.
- Challenge PCT to think as expansively as possible about the role of historic preservation and to better define and articulate its relevance to the community.
- Consider PCT's role and reputation and how it might be more effective in carrying out its mission.

INTERVIEWEES

1. Lois Bruinooge, Executive Director, and Fran Kefalas, Assistant Director, The Last Green Valley National Heritage Area
2. Ryan Grew, Executive Director, Friends of Keney Park, Hartford
3. Marcus Ordoñez, Interim Executive Director, Hartford Land Bank
4. Lauren Oakley Vincent, President and CEO, Bridgeport Downtown Special Services District
5. Debra Mecky PhD, Executive Director, Greenwich Historical Society
6. Julie Loughran, President and CEO, Connecticut Community Foundation Waterbury and Litchfield
7. Leah Glaser, Coordinator, Public History, Central Connecticut State University

THE INTERVIEW PROCESS

Prior to the interview, and after conducting background research, I posed customized versions of the following questions. Each conversation was generally free flowing and ranged beyond these topics.

1. When you think of "historic preservation" in Connecticut, what comes to mind? Can you share with me a good or bad example of historic preservation's impact in Connecticut?
2. Are you familiar with the work of Preservation Connecticut (PCT)? Can you share your perceptions/experience of the strengths and weaknesses of the organization?
3. When you think of the challenges and opportunities facing Connecticut, especially as regards the work you do, do you see a role for PCT in addressing them? Do you see areas

where PCT's work might intersect with your organization or other organizations and institutions to advance a common agenda?

4. What do you think your organization is doing right to advance equity, inclusion, and justice in the community you work in? What are you most proud of? Are there any areas where you are struggling?

5. Can you share any specific details about how DEIJ is operationalized in your work? Was there a planning process that yielded any approaches or formal policies that you can share with me.

6. PCT seeks to develop programs and policies and engage in work that is equitable and inclusive. What do you think that means for an historic preservation organization? How might PCT go about accomplishing this?

7. Thinking about PCT's work going forward, what would you like it to focus on?

INTERVIEW FINDINGS

Historic preservation can play an important role in addressing many collective challenges facing Connecticut

- **The Legacy of Segregation:** Connecticut is one of the most segregated states in the nation. That legacy, and all the disparities it wrought, is manifested in the built environment. Preservation and restoration efforts have the potential to impact the built environment in ways that could be reparative.
- **Lack of Affordable Housing:** Housing affordability and low inventory is a major issue in the state. This huge problem cannot be addressed by a single player, program, or policy. It requires local, state, and federal interventions of all kinds. However, the preservation and rehabilitation of historic housing stock is a small but important part of the solution. Preservation organizations could partner with land banks, housing agencies, and others to provide technical assistance and/or advocacy. Similarly, historic preservation can also be an important driver in addressing vacant and underutilized buildings.
- **Loss Of Community Character:** Development pressures and programs and policies that allow and incentivize tear downs are eroding the character and quality of both rural and urban areas of the state. Historic preservation is an anecdote to homogenization.
- **Transportation Challenges:** Transportation, both its failure to serve residents and its negative impact on the environment and quality of life, was raised several times. In addition, to being an advocate for equitable and community-supporting transportation and planning, historic preservation could play a role in documenting and understanding the consequences of transportation investments, or lack of investment, both historically and at present.

- **Inequality:** There is real disparity between the history that is lionized and visible and that which has been marginalized and erased. When historic preservation efforts make visible the histories and culture of all residents of the state it is an act of social justice. It also serves to engender civic pride and a sense of belonging for all.
- **Parochial and Siloed Government:** The twin challenges of Connecticut's 169 distinct town-based governance system and lack of coordination among state agencies undermines more comprehensive and regional approaches to preservation, conservation, and planning of all kinds. Historic preservation might serve to build bridges across communities and interest groups.
- **Economic Disparities and Generational Flight:** There continues to be systemic barriers to wealth creation, homeownership, equitable education, and access to resources including internet access. Nearly every interviewee expressed the fear that young people are not finding job opportunities and the social and cultural attachments needed to keep them in the state. Historic preservation has a role to play in community revitalization, the provision of community-building services. In addition, it promotes belonging, place attachment, and vibrancy that might make staying more attractive.
- **Marginalization of Indigenous Histories and Contemporary Communities:** In spite of Connecticut's rich tribal heritage and remaining communities, most of the state's organizations and institutions have failed to develop meaningful relationships with indigenous peoples. Partnering to include indigenous history and culture in historic preservation activities including survey, documentation, and stewardship might begin to create connections.

PCT is an Important and Valued Community Actor

- **Independent Voice for Historic Preservation:** There was nearly universal admiration for PCT and the role it plays especially as welcome foil to the regulatory function of the State Historic Preservation Office.
- **Convener:** PCT is seen as a convener. It can think about issues and act statewide and in ways that various government agencies and many organizations are just not able to do.
- **Hands On and Grassroot:** PCT's locally based efforts are also greatly appreciated. Jane's Walk, the Circuit Rider program, direct grants, and more are all seen as impactful, on-the-ground work.
- **Models the Future of Preservation:** History and the way we preserve, interpret, and steward it, is iterative and evolving and PCT demonstrates how we can continue to refine its practice and priorities to meet contemporary needs. Other organizations are looking to learn from PCT.
- **Unexpected:** Some respondents were surprised (and delighted) that PCT was being so intentional about DEIJ.

- **Still Rooted in the Tangible and too Focused on the Economics of Preservation:** A continuing focus on architecture to the exclusion of other expressions of history will limit the stories PCT can tell, the places it can save and steward, and the communities it can connect too. In espousing the economic value of historic preservation, PCT has failed to successfully articulate the many other attributes and influences of older and historic resources.
- **Exclusionary, Unwelcoming:** Some still perceive the organization to be a click and somewhat standoffish.
- **Growing in Sophistication:** PCT seems to be building capacity to do larger more consequential projects. This expertise can be put to work in so many ways and so many communities. Hopefully its influence at both the state and local level will grow accordingly.

Centering diversity, equity, and inclusion (DEI) will advance the mission of PCT but it takes time and resources

- DEI must be seen as an essential component of the organization's work plan, not a nice-to-have. Building trust takes time and energy, but is the single most important activity.
- PCT must be in BIPOC communities, attending meetings, providing services, learning and supporting. This work cannot be done from afar.
- PCT's work to make all histories visible is an act of reparation.
- To be a truly welcoming, PCT must understand the barriers it has created.
- Demographics don't lie, younger people are more diverse – by a host of metrics – and most recognize exclusionary beliefs and practices when they see them. Building the next generation of support and leadership for PCT requires a commitment to diversity and inclusion.
- When PCT supports local business owners, entrepreneurs, developers, tradespeople, and homeowners it is engaging in anti-gentrification.
- PCT should find ways to convene people for mutual benefit, fun, and education. People need to see each other, that is: be in the same room, respect each other's experience, expertise, and perspective and above all else, value each other's history, stories, and communities.

IMPLICATIONS FOR PCT'S STRATEGIC PLAN

The following are a set of initial ideas and approaches that might inform features of the strategic plan. These are presented in no specific order.

- PCT is ready for **larger scale work**. While time consuming and complicated, projects like Bridgeport have the potential to bring visibility, credibility, and value

to historic preservation as a community-building practice. Such projects have consequence far beyond the built environment influencing community health and wellbeing, economic vitality, and jobs. They can also have implications for social justice by directing investments into historically disadvantaged communities. Finally, they position PCT to attract funding and partnerships beyond the usual and limited suspects.

- Similarly, PCT might consider forging **unexpected partnerships** [NEST-CT](#) , [NINA – the Northside Institutions Neighborhood Alliance](#) in Hartford the [Greater Waterbury Health Partnership](#), and [Waterbury Bridge to Success](#) are some examples.
- Use history and heritage to **convene communities**. Bringing people back to historic places in dynamic and festive ways can help ameliorate polarization and promote civic pride and engagement.
- Through its current mission, programs, and work products PCT is positioned to **address systemic disparities**.
 - **Technical Assistance**: put PCT's tax credit expertise, preservation practices, grants, and advocacy to work to preserve and rehabilitate housing to make it more accessible – affordable and otherwise.
 - **Survey and Documentation**: Work to make visible and preserve here-to-fore marginalized histories as an act of equity and inclusion. Bring awareness and pride in Connecticut's full cultural and historic legacy. Create a more equitable state register.
 - **Education and Training**: DIY workshops that address both home maintenance and restoration, and tools that might promote and assist home ownership can level the playing field. PCT can also support existing or develop new entrepreneurial and developer training by layering in preservation related expertise.
- Consider **deploying the circuit riders in more targeted ways** to achieve specific objectives. The circuit rider program has a track record of effectiveness but its scope has been wide-ranging, fluid, and somewhat reactive. Can the program be grown or evolved to more strategically advance specific goals and objectives?
- Better **exploit the statewide - grassroots dichotomy** that is inherent in PCT's mission. PCT's work has been described as "layered," "in the neighborhood and at the Capitol", "wide and deep". Are there ways to reimagine this attribute and better organize or deliver the work of PCT?

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APPENDIX C

Washington Park Preservation Project Work Plan Template

Purpose: The Washington Park Preservation Project (WPP) represents the single most ambitious initiative in the history of Preservation Connecticut (PCT). It commits millions of dollars and untold numbers of staff hours and expertise to critical building repairs and improvements at five religious properties. It is intended to be transformative for the institutions that will see their buildings restored and the Washington Park community as a whole. It can also be transformative for Preservation Connecticut. This work plan template will assist PCT to organize and document the project through many lenses and many stages. It provides a means for assessing the project's effectiveness as a community-building endeavor and as an opportunity to build organizational capacity, effectiveness, visibility, influence, and sustainability.

Organizational Goals: Make a Big Impact, Engage and Inspire, Build a Strong Organization

Project Goals: Preservation and restoration of key **architectural** features of five historic churches, build **resilient** institutions that are able to carry out their missions, **catalyze** more investment of all kinds in neighborhood, leave a permanent **committee** in place to imagine and secure future investments

Notes: Many of the activities come with accompanying **supplemental materials**. These are numbered and found at the end of the document. The plan template calls for a **lead** to be assigned to each activity. Many of the activities offer an opportunity to involve board members. These as well as other staff members could be identified with the lead on the plan. This should be an **evolving document**. It should be reviewed, revised, and amended on a weekly or bi-weekly basis.

Date Activity		Purpose / Outcome			Lead	Lessons Learned
		Project	Organization	Future		
ADMINISTRATIVE						
	Create job descriptions and assign positions [1]	Ensure effective project oversight, clear lines of responsibility and authority.	Understand and prepare for consequences for whole organization. Deploy capacity appropriately. Identify additional staffing needs.	Build competency of staff to carry out work. Better understand and plan for capacity implications for PCT for future projects.		
	Determine if there are other organization program and capacity that could be redeployed to serve the project i.e. grant funds, circuit riders, survey	Increase capacity and secure more resources for project.	Learn how to more effectively leverage and deploy resources for greater impact.	Understand how current programs and capacity can be used to carry out future work.		
	Develop staff time tracking sheets	Accurately account for staff time spent on the project.	Accurately account for staff time spent on the project.	Be able to anticipate/plan for staff time for future projects.		

	Develop comprehensive budget that includes both costs associated with the project itself and other required staff time and expenses [2]	Define funding needs and create means of thoroughly tracking income and expenses.	Understand the full financial and time implications of the project. Quantify additional funding needs and be able to articulate them.	Become adept at true cost accounting. Be able to better anticipate/plan for financial needs. Build fund raising case and the capacity to fundraise.		
	Formalize WPP Advisory Committee [3]	Encourage collaboration among grantees and commitment to larger community-transforming goals for the initiative.	Build capacity to imagine and implement future investments outside PCT. Lessen load for org.	Secure capacity for future work in Bridgeport. Develop model for future initiatives.		
	Conduct assessment of administrative tools, processes, and policies and detail lessons learned					
FUNDRAISING						
	Manage State Grant	Adhere to reporting requirements.	Steward relationship with state and demonstrate capacity and effectiveness.	Put organization in position to apply for and manage future grants.		
	Use budget to confirm amount and types of additional funds needed	Meet the funding goals of the project.	Understand scope of funds required.	Be better able to anticipate/plan for future project's fundraising needs.		
	Develop fundraising prospect list [4]	Meet the funding goals of the project.	Secure necessary funds including unrestricted support for PCT.	Build out donor base beyond usual suspects for future funding.		
	Develop case statement for each prospect type	Articulate the value of the project to the community and to the state.	Articulate what PCT brings to the project.	Build capacity to articulate and fundraise effectively.		
	Create prospect tracking sheet [5]	Secure funds for the project.	Secure funds for the project.	Formalize effective fundraising strategies.		
	Develop a series of donor engagement opportunities in Bridgeport	Bring visibility to the organization and its work. Cultivate new support from new local donors.	Bring visibility to the organization and its work. Lay groundwork for new support from new statewide donors.	Build fundraising capacity and attract new donors.		
	Conduct assessment of fundraising strategies, tools, processes, and outcomes and detail lessons learned					

PARTNERSHIPS					
	Define partner/audience and goals	Understand the range of potential local support for the project. Connect project to other city/regional initiatives.	Understand who the audiences are for this type of work. Increase reach and impact of PCT, connect with new audiences, build greater support.	Build capacity to engage with new communities. Increase visibility and impact.	
	Develop strategies to reach and steward each partner/audience	Build support for the project locally.	Build support for PCT and the project locally and statewide.	Diversify partnerships and support.	
	Create tracking sheet to organize outreach activities [6]	Understand what strategies work and don't work.	Understand what strategies work and don't work.	Formalize effective partner and audience cultivation strategies.	
	Review success of efforts, refine list for future projects, detail lessons learned, plan for stewarding priority relationships				
COMMUNICATIONS					
	Identify potential audiences, local statewide, national [7]	Understand the range of audiences who may be interested or need to know about the project.	Understand the range of audiences who may be interested or need to know about PCT's role in the project.	Grow audience for the work of PCT.	
	Build distribution list of press, media, and social media outlets for each audience	Develop relationships with press and capitalize on various outlets in Bridgeport.	Develop relationships with press and capitalize on various local, state, national outlets	Bring greater visibility to the work of PCT.	
	Develop messaging points for each audience	Increase local awareness and support for the project. Learn how to effectively reach the local audience.	Build broad awareness and support for the project and for PCT. Learn how to effectively reach local, state, and national audiences.	Build communications expertise and capacity.	
	Build on current communications plan to establish a WWP communications plan/timeline	Be strategic about communications and engagement activities and timing.	Increase range and effectiveness of current communications plan.	Build communications expertise and capacity. Create model for future communications.	
	Conduct assessment of communications plan including audiences, outlets, and messaging, and detail lessons learned				

IMPACTS						
	Develop list of quantifiable impacts to be measured [8]	Secure data to be able to measure project impacts.	Consider broader impacts of the project for the organization and other preservation activities and objectives.	Use information to justify future investments.		
	Develop tracking sheet to organize findings	Be able to effectively organize, assess, and share information.	Be able to effectively organize, assess, and share information.	Be able to effectively organize, assess, and share information.		
	Collate analyze impacts and create a report on findings. Detail lessons learned.					
TOOLS AND APPROACHES						
	Develop tracking sheet to record tools, techniques, vendors, and approaches used to achieve the objectives of WPP	Learn successful ways to implement a local preservation project of this scale.	Apply new tools, techniques, vendors, and approaches to PCT's work generally.			
	Conduct thorough assessment tools, techniques, vendors, and approaches, especially new ones. Plan for their use in other projects going forward.					

Supplemental Materials:

[1] Recommended assignments and descriptions

PROJECT MANAGER:

Many staff members will be expected to have some role in WPP. However, there needs to be a staff member whose primary responsibility is WPP for the term of the project. He/she will likely need to devote 25-50% of their time to the project. The Project Manager will report to Executive Director but he/she must be given a degree of authority to act on behalf of the PCT.

Proposed Responsibilities:

- Oversee development and implementation of the work plan
- Oversee development and management of the project budget
- Solicit bids, negotiate contracts, and serve as liaison to contractors
- Serve as point person and manage project relationships – church leaders, neighbors, city officials, other community organizations and institutions
- Serve as spokesperson for the organization on issues directly related to the project
- Be responsible monitoring and reporting on progress
- Delegate responsibilities as described in the workplan
- Other responsibilities to be added as the work plan is developed

SENIOR PROJECT ASSOCIATE:

- Devote c. 25% of time to WPP
- Work directly with Project Manager to develop and implement work plan
- Take lead roles, as assigned, for grant management, communications, and additional fundraising
- Assist in monitoring and reporting on progress

OTHER STAFF ASSIGNMENTS:

Many work plan elements, as detailed above, will require additional staff time and expertise especially in the areas of technical assistance, fundraising, and community outreach. As staff members are assigned, their responsibilities and estimated hours should be described and accounted for

[2] Sample categories of organizational expenses and time to be accounted for

WPP is an opportunity to fully track and account for time and expenses associated with a major, multi-year initiative. In addition to direct expenses and accounting required under the state grant, a comprehensive budget should be developed. This very rough, sample budget suggests expenses far exceeding the revenue from the state grant. However, it allows PCT to develop a fundraising plan to try to bridge the gap. And, it will record the full amount of costs born by the organization and can inform future project development and decision making.

Sample Project Expenses

Expenses	Item	Rate	Estimated Grant	Actual Grant	Estimated Other	Actual Other	Total
	Project Manager	450 hours @ \$55	\$5,000		\$19,750		\$24,750
	Communications Staff	100 hours @ \$55			\$5,500		\$5,500
	Fundraising Staff	100 hours @ \$55			\$5,500		\$5,500
	Travel – mileage	800 miles @ .62	\$200		\$296		\$496
	Travel – meals				\$200		\$200
	Construction		\$5,500,000		\$200,000		\$5,700.00
	Fundraising Expenses				\$2,500		\$2,500
	Other						
Totals			\$5,505,200		\$233,746		\$5,738,946

[3] Proposed tasks associated with formalizing and sustaining the committee

A WPP steering committee of sorts has already been convened for the project. It is made up of representatives from the congregations as well as PCT staff and Board Members. Its primary role has been in developing the project scope, advocating for funding, and planning implementation of the projects funded by the state grant. This committee should evolve to become a permanent entity charged with imaging and implementing future investments in the neighborhood.

Toward that end, the following steps might be taken:

- Create a charter for the committee that maps out short- and long-term goals, committee membership, and responsibilities. This may also include standard operating procedures for meetings, dues, decision-making, etc. These should be as formal or as informal as required to meet the goals the committee sets for itself.

- Formalize role of PCT. Will it serve as administrator? Will it make any financial commitment? Will it serve as fiscal sponsor?
- Consider expanding membership to include representatives from local institutions, elected officials, community activists, and others.
- Develop formal meeting schedule and process for setting agendas, determining tasks and assigning responsibilities, and tracking progress toward accomplishing objectives.
- Plan opportunities for committee to host larger community to share its plans, celebrate progress, as well as solicit input, ideas, and support.

[4] Fundraising prospect recommendations for government, foundation, corporate, individual

Work with staff and board, or contract for professional fundraising services to investigate the following prospects. Key is to leverage scale of state investment and PCT's involvement as well as the excitement and energy around the project to interest new funders.

	Source	Possible Approach	Type
State	Economic Development Agency	WPP capital investments could drive other neighborhood investments i.e. small businesses, other capital improvements.	Project
	Work Force Development	Use capital projects as opportunity for trades training	Project
	Energy retrofits	Seek additional funding for energy retrofits at five churches – demonstrate that historic buildings can be made energy efficient	Project
	Parks and recreation	Use WPP as opportunity to advocate for city funds and in-kind investments for park improvements	Project
City	Housing and Community Development	WPP capital investments could drive other neighborhood investments i.e. small businesses, other capital improvements.	Project
	Office of Planning and Economic Develop	Same as above but also consider how these projects advance the City's comprehensive plan.	Project
	Parks and Recreation	Use WPP as opportunity to advocate for state funds for park improvements	Project
	Arts and Culture	Propose community convenings and other celebratory events that would help facilitate PCT outreach to the community	Organization
Foundations and other funding organizations	Bridgeport Private and Community Foundations (70) https://www.instrumentl.com/foundations/connecticut/bridgeport	Likely not a source of capital grants, but could be solicited to support the work for an on-the-ground circuit rider or other staff member whose services are working to benefit Bridgeport. Solicit grants to be used for community outreach, education, and programs. Case would be that funding supports not only the physical preservation of the buildings but community education, services, empowerment, and	Organization

		engagement. Could also be a source of funding for WPP Steering Committee	
	Fairfield County Foundation	Same as above	Organization
	National Trust / Partners for Sacred Sites Fund	Capital funding or capacity building grants	Project
	National Trust African American Cultural Heritage Action Fund	Specifically for black churches	Project
Federal	National Parks Service Underrepresented Grants or Save America's Treasure's Grants	Work with congressional reps and/or senators to develop proposal	Project
Corporations	Top Corporations in Bridgeport	Consider opportunities for sponsorship of events or actual building restoration activities. Maybe create a business roundtable encouraging commercial entities of all kinds to invest in project.	Project and Organization
Major Donors	Review boards of directors and major donors to Bridgeport institutions such as the Discovery Museum, Barnum Museum, Housatonic Art Museum, and the Public Library	Use these as well as prospecting lists and efforts already underway to solicit major donors for work specific to WPP. Develop strategies such as private tours and other cultivation events.	Organization
	Potential major donors outside Bridgeport	Use project as cultivation opportunity for new major donors and increased support from current donors.	Organization

[5] Sample funder prospect tracking

[6] Sample partner tracking sheet

– same format can be used for both

Name	New	Contact	Context and Ask	Strategy	Owner	Dates, notes on outreach	Goal
State DOT	√	Tom Doe, Regional Planner tdoe@dot.gov	Special projects funding for street signs and amenities	Partner with city to make request	MF	6/8 Met with city planner; 8/10 draft developed	Bring more investment and improvements to neighborhood
Abby Foundation		Cheryl Rodgers, ED	Preservation workshop for property owners and WPP neighbors, to serve as model for other communities	Invite Cherly on a site visit, gauge interest and solicit input. Use foundation application form	JM / MF		Use WPP as opportunity to develop and implement trainings
Mary Jones	√		Bridgeport resident, Public Library Board member and donor to Historic New England	Make case for preservation in own backyard. Invite for site visit.	CS		Discretionary funding, cultivate long-term relationship

[7] Suggested audience types

LOCAL – these are organizations and individuals that you assume will be interested in progress on this project. You can keep them informed through email, social media, and by getting local press coverage. They should be invited to local events.

- Neighbors
- Neighborhoods Associations
- Business Owners
- Local foundations
- Local organizations, institutions i.e. churches, schools, non-profit arts and culture organizations
- Local social service agencies: health and welfare, afterschool programs, job training
- City elected officials
- Boards and commissions: planning, zoning, arts/culture, recreation
- City staff

STATEWIDE – these are organizations and individuals who might cheer the project on from afar, or be interested in it as model for their own communities. Some might be prospects to assist with funding or other support for the project. Assume they are interested and develop ways to regularly report to them on progress through email or social media.

- Other preservation and community development non-profits no matter where located
- Elected officials – state representatives, governor, Congressman, Senators
- State agencies – SHPO, Economic Development, historical society, Main Street etc.

NATIONAL - seek ways to share project with national audiences. Write blogs, post updates to facebook and other social media accounts of these organizations.

- National Trust for Historic Preservation - general and African American Cultural Heritage Action Fund, and Sacred Sites Fund
- National Preservation Partners Network
- Partners for Sacred Places

[8] Potential impacts to be measured

- Square footage involved
- Jobs created
- Value of materials sourced locally
- Value of services sourced locally – labor, design, project management, etc.
- Impacts for tax base – property value increases, sales tax receipts
- Any increased revenue for the institutions such additional grants, fees for service, donations, congregant dues, etc.
- Increase in number of community members served through food pantries, childcare, afterschool programs, and other services.
- Overall investment – labor, materials, project management, design services, etc.
- Energy and building maintenance savings.
- Other

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APPENDIX D

Major Initiatives Review and Selection Process

Purpose: In the coming years, PCT will continue to work to preserve and steward individual building and sites. At the same time, it aspires to undertake bolder more complicated and more consequential initiatives that can play an essential role in addressing Connecticut's contemporary challenges such as development pressures, climate change, housing affordability, and widening gaps in wealth and opportunity. However, given its circumscribed capacity, PCT recognizes the need to be judicious in deciding how and where it spends its resources. The purpose of this review and selection process is to help PCT make decisions about the work it takes on that falls outside the scope of its normal work plan.

STEPS IN SELECTION PROCESS

The following steps will help PCT gather the information it needs to decide whether or not to undertake a major initiative. This should be seen as an initial vetting process not an exhaustive and definitive. It will not result in all the answers but it can begin to sketch out the project's potential and its risks.

1. Draft a charter for the project that roughly describes the buildings and/or places involved and preservation outcome to be achieved. If possible, name additional benefits to be secured such as new tools or model approaches, policies and/or incentives, public education, new partnerships, etc.
2. Consider what staff would be assigned to the project and estimate the number of staff hours required. Would new staff need to be hired or expertise otherwise acquired?
3. Develop an estimated budget that includes the price of all staff time.
4. Identify potential sources of funding for the project.
5. Identify potential partners for the project.
6. Create an estimated timeline that anticipates major milestones such as time to secure funding, time to contract with vendors, time to develop programs, etc.
7. Use these findings to walk through the selection criteria below.

CRITERIA FOR CONSIDERATION

Criteria can be ranked for its relative importance for decision making. Guidelines should be set regarding how many criteria must be met for approval. For example, adherence to criteria could be rated on a scale of 1-5 and/or a project may need to meet a minimum number of criteria to be considered. PCT should develop a process that works for itself. The answers to the questions posed below will not only aid in decision making, they can begin to outline a case statement for undertaking the project and its goals and outcomes.

1. Does the project serve to advance, and to what extent, PCT's goals to Make an Impact, Engage and Inspire, Build a Strong Organization?
2. Does the project serve to carry out PCT's mission to enhance and sustain the culture and vitality of Connecticut's varied communities by preserving, protecting, and promoting historic places which embody the stories of our shared past and enrich our shared future.
3. Does the proposed project set a preservation or planning precedent, or have longer-term implications for preservation in the state? Will it teach PCT new skills and build expertise and capacity?

4. Does the project affect multiple resources or have a wide impact?
5. Does the project serve to right historic inequities or protect and make visible traditionally underrepresented resources?
6. Are there opportunities to cultivate new relationships or strengthen existing ones?
7. Is PCT uniquely qualified to contribute; does it have the in-house expertise and/or resources to be effective?
8. Is PCT the only organization suited and/or qualified to undertake this work? While PCT may feel it is the “best” organization for the job, it may not be the “only” organization. If there are others able to do the work, PCT may want to step aside and allow them to.
9. Is the action likely to be successful? Projects outside the normal work plan should not be undertaken unless they have a strong likelihood for success. Given all the important work the organization is engaged in, working on lost causes may not be useful or warranted.
10. Is the estimated amount of staff time required manageable?
11. Does PCT have, or is it able to raise, the necessary resources, financial or otherwise, to undertake the action and to follow through on its commitments?
12. Is PCT willing to postpone and/or halt other work to attend to this activity? The work dedicated to this project will likely fall outside the organization’s normal work plan and so will have implications for current activities. It may require setting aside or postponing other work in order to be successful. This must be taken into consideration when deciding whether to take on the project.
13. Are there negative consequences to not acting? Sometimes there may be consequences for not taking on a project such as damage to reputation, or the alienation of funders and other supporters. This needs to be taken into consideration.

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APPENDIX E Staff Capacity Recommendations

CURRENT – 10 Staff Members

Board of Directors			
Executive Director <i>(Jane)</i>			
Deputy Director <i>(Chris)</i>	Field Service Director <i>(Mike)</i>	Development and Special Project Manager <i>(Jordan)</i>	Preservation Services Manager <i>(Renee)</i>
	Circuit Rider <i>(Brad)</i>	Membership and Outreach Manger <i>(Kristen)</i>	
	Circuit Rider <i>(Stacey)</i>		
	Circuit Rider <i>(Stefon)</i>		
	Fellow		

PROPOSED NEAR TERM - 10 Staff Members

Board of Directors		
Executive Director (WPP 10%)		
Director Administration (WPP 20%) (Administration, Development, Communications)	Director Preservation (WPP 30%) (Preservation, Education, Major Initiatives)	Deputy Director (WPP %TBD) (Fiduciary, Architectural Historian)
Membership & Outreach Manger (WPP %TBD)	Preservation Services Manager (WPP %TBD) Circuit Rider (WPP %TBD) Circuit Rider (WPP %TBD) Circuit Rider (WPP %TBD) Fellow (WPP %TBD)	

NOTES:

- Current staff experience and expertise is more varied than illustrated here. Their would be a lot of cross pollination.
- Begins to allocate time and expertise to WPP.
- Executive Director has only two direct reports and a deputy director allowing more delegation, frees her to concentrate on strategy, fundraising, etc.
- Starts to better define programmatic vs. administrative function by creating two distinct tranches.
- Makes more explicit the authority of Preservation Director to oversee major initiatives such as WPP.
- Titles, job descriptions, and duties will need to be further refined.

PROPOSED LONGTERM - 15 Staff Members

Board of Directors			
Executive Director			
Director Administration	Director Preservation	Director Advancement	Deputy Director
<i>(Administration, contract, grants)</i>	<i>(Preservation, Education, Major Initiatives)</i>	<i>(Fundraising, Communications)</i>	
Assistant	Major Initiatives	Development Associate	
	Circuit Rider	Outreach and Communications	
	Circuit Rider		
	Circuit Rider		
	Circuit Rider Apprentice		
	Preservation Manager		
	Education Manager		

NOTES:

- Begins to add development capacity and links it to communications and outreach functions.
- Adds administrative support and additional preservation capacity.
- Institutionalizes major initiatives.
- Adds a direct report for Executive Director but elevates the importance of development, outreach, and communications.
- Titles, job descriptions, and duties will need to be further refined.

Preservation Connecticut Strategic Plan 2025-2030

APPENDIX F

50th Anniversary and Washington Park Preservation Project Talking Points and Approaches

Purpose:

In order to fully realize the aspirations of its strategic plan, PCT must be able to attract continuing and new unrestricted support for its work. Below are a series of suggested talking points and potential approaches for conducting an energetic and expansive fundraising campaign over the next year. These are only suggestions, they should be further developed and refined as part of specific fundraising campaigns.

Talking Points:

General

- After 50 years, PCT's mission to preserve, protect, and promote historic places has ***never been more urgent or relevant.***
- It foresees the next 50 years as rooted in traditional practices, while undertaking ***bolder more complicated and more consequential initiatives.***
- The quality and character of the built environment is critical to community health, wellbeing and economic vitality. Preservation of historic places is an ***essential tactic in addressing Connecticut's contemporary challenges*** including development pressures, climate change, housing affordability, and widening gaps in wealth and opportunity.
- PCT's work not only preserves places, ***it changes them.*** It celebrates and preserves history, craftsmanship, and beauty to create vital, healthy, community spaces that serve all residents.
- At PCT's 50th anniversary, the most critical need is for ***unrestricted support that will allow PCT be the organization it wants to be.*** PCT's work takes time, it takes partnerships, it takes people. Our vision: PCT offers wages and benefits that attract and retain a highly-qualified, high-performing, diverse professional staff; PCT has the time and resources to build and sustain creative and effective partnerships to carry out our work; and PCT can be a voice, no matter the stakeholders, for historic places all across the state.

- **Connecticut is a very different place than it was 50 years ago.** PCT's work has evolved to identify, protect, and celebrate history that is fully representative of, and fully benefits all Connecticut residents.
- PCT's work is statewide and grassroots. **This dual role is powerful.** PCT understands and often anticipates evolving needs and can work with state officials and agencies and other partners to address them. It can also serve to connect community members with programs and resources that can support their efforts.

Specifically for past and current supporters

- At 50, PCT is one of the most high-performing, professionally-staffed, and effective statewide preservation organizations in the country. **PCT did not get here alone.** Its work has always been fueled by a community of passionate and committed advocates. Thank you for being part of that community.
- Your commitment to PCT inspires new support for our work. With you help, PCT is **growing the movement**. It is working in new places with new partners who bring new energy and new resources to the table to sustain our work. PCT uses every preservation project as an opportunity to make connections, learn from residents, build excitement, and give people the tools and resources then need to save the places they care about.
- (Using more specific examples to make this point): PCT's well-established circuit rider program, granting initiatives, survey work, and educational programs have led to the protection and stewardship of thousands of resources across the state with **consequences for the economic, cultural, and aesthetic vitality of hundreds of communities**.
- PCT will continue to save individual building and sites, but it will also take on **larger scale work with larger scale implications**. The Washington Park Preservation Project, for example, commits millions of dollars and brings 50 years of hard-won preservation expertise to transforming an historically underserved and disinvested community.
- While other organizations may play some role in preservation in the state, PCT alone is **unapologetically and exclusively focused on Connecticut**. Support for PCT is **wholly dedicated toward preserving Connecticut's rich history** and to building a successful and sustainable future.

Specifically focused on the Washington Park Preservation Project

- The Washington Park Preservation Project (WPP) in Bridgeport represents a **dynamic shift in the nature and scale of PCT's preservation program**. It commits millions of dollars and brings 50 years of hard-won preservation expertise to the table.

- ***The project puts historic preservation practices to work to achieve community-scale goals.*** It will aid institutions to become more resilient and carry out their missions; catalyze more investment in a chronically underserved community; and create a permanent cohort dedicated to imagining and securing future preservation and community-building investments.
- WPP is an unprecedented opportunity to ***grow and evolve the work of PCT*** to meet contemporary challenges. It will demonstrate that preserving historic places is both a worthwhile goal in its own right and is an essential tactic in creating the kinds of communities we want for all residents of Connecticut.

Approaches:

Again, these are only suggestions but hopefully they offer some ideas and inspiration. Formally or informally, PCT should create a 50th Anniversary fundraising committee to envision and implement efforts.

Appeal to Existing Supporters

Use the 50th Anniversary as a way to thank past and current supporters. Give them credit for PCT's success i.e. "we could not have done x,y,z without you." Suggest that it is their support that has allowed you to grow your agenda, to take on more complicated and consequential projects. With the aim of securing substantial individual donations, explicitly ask them to be part of the next 50 years by making an historic, unrestricted gift now.

Celebrate Past Success and Foretell Future Places

Create a virtual rollcall of sorts by asking individuals to share their favorite preservation success. Similarly, ask them to identify places they are most worried about. Use your existing mapping program or develop a new one to locate these places. Feature these in communication campaigns. As the list grows, create a fundraising campaign aimed at more modest giving that asks for a dollar for every place saved, or every place to be saved, or something like that.

Appeal to New Audiences

PCT's work in new communities will, in time, leverage new funding opportunities, but in the meantime, an appeal that encourages new audiences to think of themselves as preservationists might make a good first start. This could employ the concept of calling out preservation of all kinds. Develop a program that honors a wider array of individuals, organizations and businesses participating in preservation. Even the most modest acts of preservation such as putting on a new roof, cleaning up a vacant lot, adding a coat of paint to a storefront could be lauded using placards, social media badges, or other signifiers. Such a campaign would add a much larger and much more diverse set of resources to the win column for preservation and prompt many more people to think of themselves as preservationists. It would help them see that PCT as an organization shares their values and unreservedly welcomes them and supports them. They could then be asked to contribute to PCT's next 50 years.