

FUNDING PRESERVATION'S EVOLUTION



Landmarks Illinois (LI) was proud to honor seven women “Influencers” who are redefining preservation at its first-ever [Preservation FORWARD](#) event in March 2022. Using its [guiding principles](#), LI redesigned its longstanding spring event that historically provides 60% of its advocacy and grants program funding. Using a principled approach to rethink our model for an inclusive and accessible event resulted in the most diverse audience ever (age, race/ethnicity, geography and profession) and reached 95% of its \$780,000 fundraising goal. Pictured L-R are Cheryl Thomas, Alicia Ponce, Tonika Lewis Johnson, Mariah DiGrino, Eleanor Gorski, Stacey Pfingsten and Tiara Hughes.

OCTOBER 14, 2022

BY BONNIE MCDONALD, PRESIDENT & CEO, LANDMARKS ILLINOIS

After reading about the breadth of work being done to evolve preservation, I hope that you agree that change is necessary. The scale of change may feel overwhelming if you have taken in the many topics covered in [The Relevancy Project blog posts](#). Where to begin is one thing, especially when so many of us are [experiencing burnout](#) and/or lacking capacity to add anything more to our plates. Add to that the risks that accompany change. One risk is that not every volunteer, employee, supporter, commissioner, client or elected official will see this new work as “preservation.” Their support may end when the work no longer focuses on their values, beliefs and identities.

“Preservationists have to prepare themselves to lose donors. We have to be able to cultivate funds from non-white donors.”

Jeffrey “Free” Harris

Independent Historic Preservation Consultant and Historian

September 11, 2020

Hampton, Virginia [via Zoom]

Many of us would say that there is no extra support to spare to make up for lost donors. There is already not enough funding for our operational, programmatic and strategic needs. Some may see alienating existing supporters as irresponsible, foolish or dangerous. Yet, is it ethical to continue with the status quo just to secure funding? Are we essentially preserving the preservationists? An August 2021 blog post, [“The joy of fundraising,”](#) by Nonprofit AF author Vu Le encapsulates what is wrong with this transactional fundraising and what is right about fundraising for your values.¹ That is where truly joyful, authentic fundraising begins.

“Funding is the biggest factor on everything.”

Tyrell Anderson, Lori Gonzalez, Andrea Ledbetter, Carl Witherspoon, Jr.

The Decay Devils

March 14, 2020

Gary, Indiana

GO AT YOUR OWN PACE

The Relevancy Guidebook, which is the culmination of this project, will feature a list of small-to-large actionable steps to enhance your organization’s relevance. I hope that you are motivated, if not excited, to join in the movement to evolve the [nearly 60-year-old preservation field](#).² However, each organization is at its own state of readiness and there is no set of one-size-fits-all steps to take. Go at a sustainable pace for you and your organization. “A journey of a thousand miles starts with a single foot step.” – Laozi (Lao-Tzu), [“Tao Te Ching”](#)

“We’re trying to work for social justice, but most of our funders have benefited from exploitative corporations. So how do we take money from them? It’s hard to be picky. It’s hard to create a just world when you’re taking money from the unjust.”

Alissa Shelton

Former Executive Director

Brick + Beam Detroit

April 10, 2020

Hamtramck, Michigan [via Zoom]

¹ Le, Vu. [“The joy of fundraising: How fundraising can be truly, authentically joyful.”](#) Nonprofit AF, August 21, 2022. Accessed October 4, 2022. <https://nonprofitaf.com/2022/08/the-joy-of-fundraising-how-fundraising-can-be-truly-authentically-joyful/>

² I am using the 1966 passage of the [National Historic Preservation Act](#) as the establishment of the preservation field in this case. <https://www.nps.gov/subjects/historicpreservation/national-historic-preservation-act.htm#:~:text=The%20act%20established%20permanent%20institutions,the%20Secretary%20of%20the%20Interior.>

Knowing your organization's values and principles provides a strong foundation to guide change and to fundraise for your evolution. Landmarks Illinois began discussing how our organization needed to change in 2017 as we defined our organizational values. Conversations continued as we explored how we wanted our work to be more relevant and impactful. Our preparations included hosting a critical cultural competency training (2020) and developing our guiding principles (2021). We spent five years talking with hundreds of people about our questions and ideas. Through these conversations, we learned where we already had support and raised funds to develop evolutionary action plans. This is all to say that you can implement thoughtful, systemic and transformative change while pacing yourself. You do not want to invest people in transformational change and then have to put it on hold due to poor planning or burnout. This just engenders mistrust. Start at a pace that you can sustain, build excitement for your vision and begin garnering support to make the change you want to see in preservation.

BEGIN BUILDING NEW FUNDER RELATIONSHIPS IN ADVANCE

As Landmarks Illinois has implemented its vision to redefine preservation and to build a relevant movement, a handful of major donors and donor prospects have stopped supporting our work. The board and staff discussed and prepared for this risk by evaluating our reserves and reaffirming our commitment. To date, four major donors have left, but another four expanded their giving because they felt seen, welcomed and that they belong in our preservation community. When we aligned our operations with our values, principles and vision, our team's fundraising passion, joy and success followed, as Vu Le expressed. There were certainly moments when success seemed precarious. We invest our time and a bit of ourselves in building donor relationships. Seeing longtime supporters walk away felt terrible. What kept us going was the knowledge that we were building an inclusive and welcoming environment for others who had not seen themselves represented in preservation. It is never too early to begin building meaningful relationships with those who believe in our work.

IDENTIFY AND CULTIVATE YOUR AMBASSADORS

Yes, but how do you do this – especially if you have a small (or no) staff? The first place to start is with your organization's ambassadors. They may be your volunteers, board and committee members, staff and their family and friends, funders, event goers, contractors and consultants, partner organizations and people who have benefitted from your work.

How do you deploy your ambassadors? You may be surprised how willing people are to engage their network when they are excited about your vision and they are asked to help in a specific way. Ask your ambassadors to talk about your organization with others, volunteer and bring people to events, sign colleagues up for your newsletter or support your fundraising. Ask your ambassadors for introductions to foundation and donor-advised fund board members, corporate marketing and charitable giving staff that they know.

Your ambassadors can also be a lifeline of strength, courage and reassurance as challenges to your vision arise, and they can encourage the staff and each other and be a cheerleader when needed. They can make public statements on your behalf, lend their expertise or reputation to

a new project or serve as thought leaders as you implement change. You may need to ask that they increase their giving to offset any losses. Thus, it is very important to ensure that you have their participation and commitment early in the process.

IDEAS FOR SPECIFIC DONOR CATEGORIES

Lack of adequate funding was one of the top concerns for The Relevancy Project interviewees. There is not enough funding to expand needed capacity to manage our existing workload, let alone conceptualizing and implementing organizational transformation. The pervasive resource desert that we work in is a relevance bellwether. Inspiring exceptions to this rule include the African American Cultural Heritage Action Fund at the National Trust for Historic Preservation and Latinos in Heritage Conservation, both of which have received substantial funding. As you work with your organizational ambassadors and build meaningful relationships with prospective funders, consider the following funding statistics and ideas to capture new and expanded revenue.

INDIVIDUAL

Individuals continue to provide the vast majority of U.S. philanthropic giving at 77% of total giving (bequests included). They far outpace foundation giving at 19% and corporations at just 4% of overall charitable giving.³ From 2020 to 2021, giving to arts, culture and humanities organizations saw an estimated increase of 27.5%. Donors are also giving significantly more to public-society benefit organizations like civil rights advocates, environmental and animal organizations, health and human services, which are areas that intersect with preservation.⁴ Here are ideas to identify and cultivate individual donors:

- Review the IRS Form 990's of partner organizations doing the work that you are interested in moving into. See if you have any donors in common who would support both organizations' work. Show this list to your ambassadors to see if they know any of these donors. NOTE: We are not looking to plunder donors, but to align with existing donors where our work intersects.
- Attend these organization's events and meet others interested in this work. Talk about how preservation intersects. Look at the program supporters to see if you have donors in common who may not know you are working in this space.
- Talk with the people your ambassadors bring to your events. Find out about their interests. Later, explore if they have donor advised funds or if they have connections to foundations.
- Put on programs where you begin to talk about your interest in this work, bring in experts and/or focus on success stories to present about impact.
- Find and publish data about this kind of work in your community to frame the opportunity and scale of the issue. Share this information with your members and invite

³ ["Giving USA: Total U.S. charitable giving remained strong in 2021, reaching \\$484.85 billion."](https://philanthropy.iupui.edu/news-events/news-item/giving-usa--total-u.s.-charitable-giving-remained-strong-in-2021,-reaching-$484.85-billion.html?id=392) Lilly Family School of Philanthropy, Indiana University - Perdue University Indianapolis (IUPUI), June 21, 2022. Accessed October 4, 2022. [https://philanthropy.iupui.edu/news-events/news-item/giving-usa--total-u.s.-charitable-giving-remained-strong-in-2021,-reaching-\\$484.85-billion.html?id=392](https://philanthropy.iupui.edu/news-events/news-item/giving-usa--total-u.s.-charitable-giving-remained-strong-in-2021,-reaching-$484.85-billion.html?id=392)

⁴ Ibid.

their engagement. See who follows up with you and begin cultivating them as a volunteer and/or donor.

- Honor projects in this program area to introduce case studies and concepts to your members and donors. Note and cultivate the donors who come for those projects.
- Hold tours at sites where you want to work.
- Send articles about the work to interested donors.
- Invite donors to attend conferences about this work with you.
- Though this may be obvious, remember to ask your prospective donors for financial support. People do not typically donate unless they are asked.

FOUNDATIONS

The good news is that foundation giving has increased in 10 of the last 11 years to 19% of total philanthropic giving. Yet, investing in building foundation relationships and applying for grants takes considerable time with uncertain results. Weigh the prospective return-on-investment of applying for grants carefully. Consider an incremental plan to add foundation funding and look for signals, such as invitations to apply, that your application will be successful. Here are ideas to cultivate foundation donors:

- Look at which foundations are funding partner organizations that are doing the work that you want to initiate or expand. Ask your existing foundation partners if they would introduce you to these foundations.
- When attending partner events, look for foundations supporting the event that have program giving areas that align with your work. Follow-up with them after the event.
- Research the foundations' giving areas, develop a set of talking points about how your work aligns with their priorities and then ask for an introductory meeting.
- Prepare information about the scale of the opportunity or issue and how your project or services will provide a solution.
- Share relevant data and articles about your aspirational work with foundation partners.
- Offer to take funders on a tour of prospective projects and meet with partners and advocates.

CORPORATIONS

Corporate charitable giving is the smallest giving sector at just 4%, inclusive of cash and in-kind giving. Consider this 4% compared to individuals' 77% giving when allocating your fundraising capacity. I am confident that preservation organizations can raise greater than 4% of our charitable giving from corporate partners. At Landmarks Illinois, our [Annual Corporate Sponsor Program](#), and corporate in-kind giving, accounts for over 25% of our charitable giving. Here are a few ideas to cultivate corporate donors:

- Design a corporate sponsor program to outline benefits and expectations. It is important to have clear parameters to ensure consistent treatment. Again, you can start small, with only one or two corporate partners.

- Identify the corporations (design, professional services, contractors and subcontractors) involved with preservation projects or on projects relating to your organization's vision. We make it a practice to build a long-term, and not transactional, relationship with our corporate sponsors, as they enjoy providing more than just dollars. Our corporate partners also donate expertise, ideas, feedback, services and contacts.
- Ask your existing corporate partners to identify others that might want to become corporate sponsors. They are unlikely to identify their competitors, but they may introduce you to providers in other areas of the field.
- Talk with the corporate partners that attend your, or partner organizations', events. Find out about their interests. Later, explore if there is alignment with your work.
- A corporate sponsorship does not equate to endorsing the corporation's product or services. However, you should feel comfortable having your organization's name affiliated with their company. Do you condone their business practices and believe their product is helping or doing no harm?

GOVERNMENT

The National Park Service offers [18 grant and subgrant programs](#) available to Native Hawai'ian, Tribal, local and state governments, Historically Black Colleges and Universities and nonprofits for historic preservation, traditional cultural heritage preservation and repatriation. Opportunities for change-making partnerships to qualify for these programs are substantial and exciting, as grant awards can be significant.

“Asian and Pacific Islander Americans in Historic Preservation, Latinos in Heritage Conservation, Rainbow Heritage are all volunteer based. They have no funding. What would it look like for them to have staff? What could preservation be if that multiplicity of voices were funded?”

Michelle Magalong

Executive Director

Asian and Pacific Islander Americans in Historic Preservation (APIAHIP)

October 9, 2020

College Park, Maryland [via Zoom]

NATIONAL FUND FOR CHANGE IN PRESERVATION

We need more, and more accessible, funding to support nonprofits working to make preservation more relevant. Providing general operating support, if donors do leave an organization, could keep the doors open until other donors step up. There are far too few grants and program-related investments available to support the scale of preservation's necessary change. The following funding sources provide operating and program support to implement organizational or agency change:

- The National Trust for Historic Preservation's (NTHP) [African American Cultural Heritage Action Fund](#) provides grants for organizational capacity building, programming and interpretation, project planning and capital projects to preserve African American

Cultural Heritage. Depending on the request, grants range from up to \$50,000 to up to \$150,000.

- The [Moe Family Fund for Statewide and Local Partners](#) at the NTHP is available to dues-paying organizational members of the National Preservation Partners Network. Grants of up to \$10,000 are awarded to support embarking on new work or improving existing programs, in one or more of the four preservation priority areas.
- Though it is not positioned as an innovation grant, the [National Fund for Sacred Places](#), a partnership of Partners for Sacred Places and NTHP, provides substantial capital grants to religious congregations and nonprofits.
- Grants through the Historic Preservation Fund are available to [Certified Local Governments](#) through State Historic Preservation Offices. Projects can include surveys, National Register of Historic Places nominations and listing revisions, community planning, feasibility studies and structural assessments, public education projects and material reprinting. Projects in each one of these categories can support a more relevant preservation movement.

“Is preservation currently serving where there is the greatest need? I don’t know if we can answer that question. We [foundation program officers] have to be opportunistic to triangulate need and what the board will fund. We don’t have the luxury of asking, as the board has given us a lane of funding.”

Cara Ferrentino
Program Officer, Public Space
William Penn Foundation
August 21, 2019
Philadelphia, Pennsylvania

This is a call to our major individual and foundation funders nationwide to convene a conversation about creating a fund to accelerate relevant change in preservation. An accessible national innovation fund available to any group, nonprofit or governmental agency, including projects that engage for-profit consultants, could accelerate change by providing a funding safety net as some supporters leave before others take their place. With such a fund, the preservation field would be more likely to take courageous steps toward building an inclusive, equitable and solutions-oriented movement.

YOUR INPUT IS VITAL

Your thoughts on this and forthcoming topics are not only welcomed, they’re imperative to ensuring this project is inclusive, with well-considered outcomes. So post away on my [LinkedIn](#) or [Twitter](#) accounts, or send me an email at bmcdonald@landmarks.org. I’ll collect and consider your comments to inform future blog posts and the project’s outcomes published in the forthcoming Relevancy Guidebook to the U.S. Preservation Movement (working title).

DISCUSSION QUESTIONS

- What is your vision for the future of your preservation organization? In what areas do you want to work to be a solution?
- Have you begun to assemble ambassadors to reflect on this vision and to engage others in the work? If not, can you list three people who you can speak with in the next month about your ideas?
- What adjective would best describe your finances: strong, mediocre, tenuous, or dire? Do you have stronger areas of your finances that you can focus on to better balance the weaker points? Have you sought and accountant's advice on how you could improve your finances?
- How confident or concerned are you that building a more relevant preservation movement will engage or alienate your donors?
- If this feeling borne out of evidence or is it a feeling? Have you begun to speak with your supporters about your vision for change?
- Imagine that you have implemented your vision for a relevant preservation organization. What is the organization doing? Who is engaged in the work? What impact is your work having and where?
- What are you afraid would happen, if you lost minor, moderate or significant donor support? What outcomes do you believe might follow?
- Which feels more motivating to you: imagining what your successful organization looks like in the future or fearing the consequences of change? There is no right answer. This is a way to gauge your readiness for change and the speed at which you can go. Note that you can continue to ask this question periodically and see if your answer changes. Adjust your plans accordingly.

STAY TUNED FOR THE FINAL BLOG POST INTRODUCING THE RELEVANCY GUIDEBOOK