COVER IMAGES, clockwise from top left:

- The Trust celebrates its 40th anniversary with the conference “Old Roots/ New Routes,” cosponsored by UConn Law School in Hartford and attended by nearly 200 people.
- The first “Preservation Pedal” took members and friends through Ivoryton, Essex, and Deep River to see a variety of historic resources by bike.
- Former Trust Board member Tom Nissley helps lead a community clean-up at the Hoyt-Burwell-Morse House in New Canaan.
- The Wilton Historical Society hosted a Trust “Private Access Tour” event on their campus of five historic buildings, led by architect Rob Sanders, who explained the rehabilitation process. The Trust awarded $15,000 for exterior painting of one of the buildings, the Betts-Sturges-Blackmar House.
- Noted expert David Oat hosts a Trust members’ event focusing on best practices for gravestone restoration at a cemetery outside the Long Society Meeting House in Preston.
- The Trust coordinated a “Private Access Tour” of the Hilliard Mill complex in Manchester, including an exclusive opportunity to go inside the oldest building on the complex, with parts dating to the late eighteenth century. Here, the developer gives a sneak preview of his plans for the mill, included in the Trust’s Making Places survey.
# Table of Contents

OUR OVERALL GOAL ........................................................................................................4

INTRODUCTORY CONTEXT ..........................................................................................5
  Preservation Matters
  A Decade of Planning
  Key Partnerships
  Looking Toward the Future

GLOSSARY .......................................................................................................................7

GOAL 1: MAKE A BIG IMPACT ....................................................................................8
  Prioritize the Circuit Rider Program
  Popularize Tax Credit Financing for Preservation Development
  Deploy the Revolving Loan Fund
  Advocate for Policies that Matter
  Advocate for Places that Matter
  Identify and Recognize Significant Places
  Protect Special Places in Perpetuity

GOAL 2: ENGAGE & INSPIRE .....................................................................................16
  Develop a Communications Strategy
  Use Grants as Vehicles for Engagement
  Use Awards as Vehicles for Engagement
  Expand Type and Number of Educational Events
  Expand Type and Number of “Friend-Raising” Events
  Quantify Economic Impact of Preservation Programs
  Use the Boarding House to Highlight Best Practices

GOAL 3: STRENGTHEN ORGANIZATION ................................................................24
  Diversify Sources of Revenue
  Build an Endowment Fund
  Increase Membership
  Embrace Staff Talent
  Initiate an Internship Program
  Recruit a Diverse and Active Board

ACKNOWLEDGEMENTS ...............................................................................................30
This 2018 Strategic Plan pushes the Connecticut Trust for Historic Preservation to expand upon its strengths and identify opportunities for future growth. Simply put:

We aim to build an impactful, engaging, inspiring, and strong historic preservation organization.
This 2018 Connecticut Trust for Historic Preservation Strategic Plan aims to position the Trust as “an impactful, engaging, inspiring, and strong historic preservation organization.” Embedded within this aspirational statement are three Goals:

- We want to make a big impact
- We want do work that engages and inspires
- We want to be a strong organization

These Goals are intentionally broad and are further articulated in this Plan through 20 specific Strategies, each reinforcing the other.

**PRESERVATION MATTERS**

As we developed this Plan, we kept in mind the Trust’s long-standing mission statement: to preserve, protect, and promote the buildings, sites, and landscapes that contribute to the heritage and vitality of Connecticut communities.

Simply put, we believe that preservation really matters. It matters because historic places in the present moment connect us to the lessons, techniques, people, and stories of the past. They evoke emotions and memories; some are considered sacred. The historic places we choose to preserve speak to our identity and reflect our values as a society.

Historic places also generate and leverage private economic activity: in the range of half a billion dollars each decade, with over 6,000 jobs in tourism, rehabilitation, maintenance, and related areas in Connecticut.

And historic buildings tend to be built better than current construction: they can be more comfortable, and preserving them is inherently more sustainable. Their warm materials often appeal to the heart.

**A DECADE OF PLANNING**

It is to realize these preservation values that we strive to continually improve as an organization. Over the last ten years, three strategic plans have successfully guided the progressive expansion of the Trust’s reach and impact. These strategic plans drove shifts that permanently transformed the Trust, and put us in a strong position to face current challenges, and our future.

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The 2007, 2010, and 2014 strategic plans were important documents that guided the Trust’s development over the last decade.
One of the most significant shifts during this period was the Trust’s commitment to the idea that preservation is an economic driver that creates jobs, increases property values, and stabilizes neighborhoods. The Circuit Rider program, created in 2001, was strengthened, with new financial tools offered to partner communities. An economic impact study was commissioned and published. Fee-for-service programs, including one related to tax credits, brought new revenue into the Trust and supported meaningful preservation projects. And a Revolving Loan Fund was capitalized through major gifts.

Another significant shift during the last decade was the Trust’s increasing emphasis on large-scale surveys, thematic websites, and educational documents. All of these activities aimed to increase awareness and appreciation of some of our greatest historic assets, in partnership with Connecticut’s State Historic Preservation Office. The Barns, Creative Places, and Making Places surveys and their accompanying websites and “trails” were ambitious in scope, catalyzing both academic and development interest in specific sites. A volume, Connecticut Architecture, identifying the state’s most significant and representative sites, is nearing completion and will be a tremendous asset.

In addition, the Trust expanded its awards program, renovated its headquarters (including solar panels), and created new events, such as brewery tours and art shows.

**KEY PARTNERSHIPS**

The last decade has also seen the emergence of several key partnerships. The most important of these is
with Connecticut’s State Historic Preservation Office (SHPO). To the unfamiliar, the Trust and SHPO are confused for one another. SHPO is the State’s official public preservation office, which evaluates and implements state preservation policy, while playing an important role in the Federal preservation framework. Though the Trust was chartered by the State legislature in 1975, it is a private, nonprofit organization.

SHPO has helped initiate and support a large number of successful Trust programs, including the Circuit Rider program and various “re-grant” programs, where the Trust reallocates SHPO funding to other organizations. SHPO has also worked with the Trust to expand preservation knowledge – co-organizing conferences, workshops, and trainings that span a diverse array of topics.

And SHPO has funded and supported the Trust’s efforts to conduct large-scale surveys of historic places. These surveys have catalyzed economic development, resulted in the protection of threatened properties, and expanded the number of properties formally designated historic on the State and National Registers of Historic Places. Formal designation is important because it may trigger heightened protection, through local ordinances or state environmental protection laws, and it may make properties eligible for rehabilitation tax credits offered by the state and federal governments.

The Trust, meanwhile, has taken a lead on advocacy where SHPO is unable to take a formal position. In other cases, such as advocacy for the Community Investment Act or for historic tax credit programs, SHPO and the Trust work hand-in-hand to achieve shared goals.

Beyond SHPO, the Trust works closely with Connecticut Preservation Action (a nonprofit organization that focuses on lobbying and advocacy), state politicians, the Connecticut Humanities Council, and local historic district commissioners on efforts described throughout this Plan. As this Plan suggests, new partnerships must be formed for the Trust to remain successful and relevant as it approaches its 50th year. Of particular interest are local historic preservation societies and the Connecticut League of History Organizations, who will benefit from involvement with the Trust, just as we will benefit from involvement with them.

**LOOKING TOWARD THE FUTURE**

This Strategic Plan looks to the next five years. We must address new challenges – first and foremost Connecticut’s fiscal crisis – while steadily advancing our central mission. With careful implementation of this Plan, we believe that the Trust will not merely survive, but thrive, in the years ahead.

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**Glossary**

As you read this Plan, you may encounter these terms:

- **“PLAN”** = The Strategic Plan as a whole.
- **“GOALS”** = Desired results within the Plan.
- **“STRATEGIES”** = Specific actions we think will help us achieve our Goals.
- **“TYPE”** = The 7 types of Strategies we are considering:
  - Administration: An action that advances optimal functioning of the organization.
  - Education: An action that involves public awareness or engagement.
  - Fundraising: An action that involves successfully seeking financial support.
  - Incentive: An action that encourages or provides benefits for behavioral changes.
  - Policy: An action that changes law, regulation, or policy.
  - Program: An action that involves development of specific projects or initiatives.
  - Survey: An action that inventories or assesses.
Goal 1: Make a Big Impact

The Connecticut Trust for Historic Preservation must position itself to maximize its impact while using available financial, staff, and partner resources.

What does having a big impact mean? It means:

• The programs and projects of the Trust have a clear mission, are innovative and effective, and produce tangible results.
• The day-to-day experience of the people of Connecticut is enhanced by the Trust’s actions relative to the state’s historic buildings, structures, landscapes, and archaeological sites.
• There is a “place of impact” for which the Trust is locally recognized in every city, town, and borough in Connecticut.
• The Trust is recognized as the leading private organization in statewide preservation efforts, which leverages partnerships to achieve its goals.

Waterbury Mayor Neil O’Leary and Webster Bank President Jim Smith lead the celebration of the rehabilitation of homes in the historic Hillside neighborhood, with the financial assistance of the Trust.
Making a big impact
is possible if the Trust expands existing efforts to:

<table>
<thead>
<tr>
<th>#</th>
<th>Strategy</th>
<th>Type</th>
<th>Purpose</th>
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</thead>
<tbody>
<tr>
<td>A</td>
<td>Prioritize the Circuit Rider Program</td>
<td>Program</td>
<td>Support the Trust’s most popular service program</td>
</tr>
<tr>
<td>B</td>
<td>Popularize Tax Credit Financing for Preservation Development</td>
<td>Incentives</td>
<td>Support private developers while enhancing fee for service revenue</td>
</tr>
<tr>
<td>C</td>
<td>Deploy the Revolving Loan Fund</td>
<td>Incentives</td>
<td>Improve capacity of revenue-generating program</td>
</tr>
<tr>
<td>D</td>
<td>Advocate for Policies that Matter</td>
<td>Advocacy/Education</td>
<td>Lead the conversation on statewide policies promoting and protecting significant places</td>
</tr>
<tr>
<td>E</td>
<td>Advocate for Places that Matter</td>
<td>Advocacy/Education</td>
<td>Negotiate, persuade, and provide incentives to save threatened historic places</td>
</tr>
<tr>
<td>F</td>
<td>Identify and Recognize Significant Places</td>
<td>Survey</td>
<td>Use surveys and nominations to historic registers to highlight important or threatened historic places</td>
</tr>
<tr>
<td>G</td>
<td>Protect Special Places in Perpetuity</td>
<td>Program</td>
<td>Use conservation and preservation restrictions to protect historic places from incompatible development</td>
</tr>
</tbody>
</table>

More information about each of these strategies follows.

**A. PRIORITIZE THE CIRCUIT RIDER PROGRAM**

The Circuit Rider program, established in 2001, is the Trust’s most popular and well-known program. Through the program, staff provides immediate, on-site assistance to historical societies, property owners, developers, elected officials, and local preservation commissions across the state. Currently, the Trust employs two part-time Circuit Riders, who meet with groups in 75 to 100 towns annually.

Circuit Riders provide four important services:

1. Technical assistance for preservation projects
2. Response to emergency requests from communities facing the loss of important historic places to evaluate options and assist in negotiating either alternatives to demolition or suitable mitigation
3. Financial guidance to help entities develop needed scopes of planning and capital work, and identify pertinent grants and loans
4. Trainings, workshops, and model ordinances

In providing these services, the Circuit Riders aim both to ensure that historic places are repaired, rehabilitated, and reused, and to increase local capacity for stewardship and good policy-making. Given their position on the “front lines,” the Circuit Riders often hear of issues and identify trends earlier than anyone else in the state.

Initiated with funding from the National Trust for Historic Preservation, since 2010 support has come primarily from our partners at the State Historic Preservation Office, in an amount of at least $1.2 million. Securing long-term, non-governmental support for the Circuit Riders is a critical need and an ongoing challenge. Publicizing Circuit Rider work through a blog or other means will be considered as part of an overall communications strategy overhaul.

**B. POPULARIZE TAX CREDIT FINANCING FOR PRESERVATION DEVELOPMENT**

For the last decade, the Trust has been a national leader in developing innovative financing structures for preservation development. One of the most significant programs of the Trust is its tax credit facilitation program.

Tax credits offset the costs of rehabilitating historic buildings and stimulate stewardship of properties listed on the State and National Registers of Historic Places. The Trust’s program facilitates such rehabilitation projects by ensuring that the developer receives the full
value of federal or state tax credits. The Trust publicizes this opportunity through the Circuit Rider and Making Places (industrial mills) programs, and through presentations to the public and commercial brokers on the application of the tax credits to rehabilitation projects.

The Trust earns fees for its formal participation in these deals. Since first introduced in 2014, the Trust’s involvement in tax credit projects has generated $357,729 for the Trust, to date primarily for residential conversions in large Connecticut cities. In addition, the Trust is currently under contract for deals worth nearly $19 million, with about $120,000 in anticipated income from fees. The Trust also participates in other tax credit projects as a paid consultant for a fee to complete the applications required for the tax credits.

Identifying new projects to participate in this program can expand the Trust’s reach and financial viability. The Trust will continue to provide information to developers, accountants, and other real estate professionals, and to engage those groups in the Trust’s advocacy for the expansion of the state tax credit for commercial properties, which is always oversubscribed.

At the same time, the Trust will initiate new online and in-person workshops about the state homeowner tax credit, which is regularly undersubscribed. These workshops will be promoted to neighborhood associations and historic district commissions, among others.

C. DEPLOY THE REVOLVING LOAN FUND

The Revolving Loan Fund, while technically a separate organization from the Trust, may present the most significant new opportunity to expand the Trust’s impact. Currently capitalized with about $1 million, the Fund aims to make direct investments in development projects throughout the state, integrating with the Circuit Rider and other Trust programs to maximize impact.
The Revolving Loan Fund provides short-term financial assistance that fills funding gaps for preservation projects. It offers nonprofit and for-profit developers three different funding sources: predevelopment loans, bridge loans, and purchase options. Predevelopment loans support planning, marketing, feasibility, and environmental studies. Bridge loans help with financing between the time a tax credit or grant is approved and the receipt of a permanent loan or grant funds. Purchase options, primarily intended for buildings under threat, may be available.

This program has a sizeable endowment, but it must expand its impact by being deployed in more projects. Marketing is a high priority.

**D. ADVOCATE FOR POLICIES THAT MATTER**

The Trust has successfully advocated for a range of statewide policies, covering village districts, regulation and creation of historic districts, and rehabilitation tax credits. The Trust often collaborates with other organizations, including Connecticut Preservation Action, Audubon Connecticut, the Connecticut Humanities Council, and the Connecticut Housing Coalition. Central to this advocacy is education – of legislators, fellow advocates, and others – about the value and importance of significant historic places.

One of the pieces of legislation we have long promoted is the Community Investment Act (CIA). CIA grants to the Trust have funded contracted services for the State Historic Preservation Office and re-granting programs, including the Trust’s Circuit Rider program, survey projects, Historic Preservation Technical Assistance Grants, the Vibrant Communities Initiative, Making Places, and the Maintenance and Repair grant program. The Trust has shown it can do more and reach more people with each dollar of government support than government agencies can. More support for the Trust leverages the impact of each dollar of public funds in environment where the State budget is constrained. That is why advocating for the CIA is an excellent use of staff, member, and partner time and effort.
Beyond the CIA, the Connecticut Trust will establish new partnerships and strengthen existing connections with environmental groups, the Connecticut Department of Transportation, developers, economic development professionals, real estate and insurance agents, federally recognized tribes, local historic and village districts, historic societies, building departments, garden societies, neighborhood associations, and skilled trades people. With such partners, the Trust can advance the relevance and importance of historic preservation.

Substantively, future advocacy efforts might aim to:
• Ensure proper planning and mitigation for historic places affected by major infrastructure projects
• Require better training for local historic district commissions
• Address sustainability and stewardship consequences resulting from climate change by promoting disaster planning and resiliency planning
• Reconcile standards for tax credit approvals with best practices for energy efficient and sustainable building design

On that last point, it is important to recognize that the Trust proposes and monitors changes to state enabling legislation for local preservation law. Over the past five years the Trust has drafted local model ordinances in three areas: deconstruction, demolition delay, and historic district regulation. Its model ordinance on historic district regulation will be updated for solar, passive drainage, and carbon footprint considerations. In addition, model design guidelines for local historic districts, usable by towns across the state, is a high priority.

E. ADVOCATE FOR PLACES THAT MATTER

One of the Trust’s core missions is to advocate for places that are historically significant through political pressure, coalition-building, education of relevant constituencies, and, in extreme cases, litigation. We step in most often when local groups lack capacity to protect.

At the home of late sculptor David Hayes, in Coventry. His home was recognized on the Creative Places survey, focusing on 20th-century artists completed by the Trust in 2017, in partnership with the State Historic Preservation Office.
historic places on their own, or when resources of state-
wide importance are at issue. The Trust must continue
to play these roles as threats to places that matter arise.

In 2016, the Trust worked with the State Historic Pres-
ervation Office and UConn toward a reasonable resolu-
tion for the planned demolition of Faculty Row, a group
of nine-century-old homes in a part of campus slated
for redevelopment. In 2017, the Trust helped lead ef-
forts to protect shoreline resources in the eastern part
of the state, including historic Old Lyme and the Florence
Griswold Museum, as well as Branford and Guilford,
among other places, in light of a federal high speed rail
proposal. Currently, the Trust is involved in efforts (in-
cluding litigation) to protect in perpetuity the Lebanon
Town Green. A mile long and in pristine condition,
the Lebanon Town Green is one of the most significant
common spaces in New England.

Advocacy often, and perhaps best, occurs in tandem
with the Trust’s efforts to identify and recognize signifi-
cant places, discussed next.

F. IDENTIFY AND RECOGNIZE
SIGNIFICANT PLACES

The identification and recognition of significant plac-
es has been an increasingly important priority for the
Trust. Over the years, the Trust has surveyed historic
resources as a contractor under grants from the State
Historic Preservation Office in fulfillment of the agen-
cy’s responsibility to identify and list properties on the
State and National Registers of Historic Places.

These have included geographic areas as well as the-
matic surveys of theaters, town greens, barns, Creative
Places (sites associated with 20th-century artists and
writers), and Making Places (industrial sites). Surveys
involve creation of a historical overview, identification
and documentation of individual sites, and preparation
of State or National Register nominations.

The Trust has further promoted the survey results with
websites, virtual and physical “trails,” presentations, and
other events. In the case of Barns and Making Places,
the projects included grantmaking as well as technical
evaluation and assistance for rehabilitation or reuse.

Members of the preservation community seem to love
these surveys. The 2017 constituent questionnaire re-
vealed that over half of respondents in every category
deemed the surveys to be effective in raising awareness
about highlighted resources.

The Board and staff must do some serious thinking
about future priorities for large-scale surveys and other
recognition for significant places. Some ideas cur-
cently under discussion include:

• Maritime Connecticut, with a focus on Long
  Island Sound and the Connecticut River, encom-
passing buildings, lighthouses, and fishing and
  whaling history
• Mid-century modern architecture, building upon
  surveys completed for Litchfield County and New
  Haven
• Sacred places with architectural or historical sig-
nificance
• Twentieth-century schools, which are being aban-
doned by municipalities
• Cultural landscapes or “mosaics” focused on particular ethnic or racial groups
• Locally-preserved, publicly accessible buildings, landscapes, and resources (like house museums)

A lower priority, still worth mentioning, is the need to update prior, early National Register nominations. In addition, there is the possibility of using materials already compiled by the Trust to develop a broader guidebook of places in every community in the state.

The State Historic Preservation Office could be asked to fund future historic resource inventories and nomination projects. Other sources of funding may include neighborhood associations, developers, property owners, foundations, nonprofits, and crowd-funding.

G. PROTECT SPECIAL PLACES IN PERPETUITY

Holding preservation easements is one of the Trust’s most important stewardship activities and oldest programs. The Trust holds easements on 31 properties, totaling 83 acres across the state. Each easement requires an annual inspection of the property and binds the Trust to review proposed changes to protected features and to seek remedies for incompatible alterations.

When the Trust accepts a new easement, it receives a fee, typically 1% of the appraised value. The fee is deposited into a segregated account dedicated for the administration of the easement program. The account supports staff time to initiate, administer, and maintain the easement over its life, as well as potential future legal costs.

A 2017 survey of constituent groups indicates little knowledge about the easement program. Indeed, realtors may advise preservation-minded property owners against donating easements. But because easements are assets, their benefit must be better understood by potential easement donors and by local preservationists, land stewards, estate attorneys and other professionals.

Currently, the Trust only closes an average of one easement donation every two years. For every easement that comes to fruition, approximately four do not. The Trust has never actively pursued donations of easements. Instead, individuals, developers, and nonprofits (including the National Trust for Historic Preservation) find the Trust. In several instances, easements were created on properties donated to the Trust, for which no other organization would accept responsibility.

Over the next five years the Trust will proactively seek easements. The Trust will continue to maintain a segregated account into which easement fees are deposited and will establish a policy for allocating and protecting this funding. Partnerships with the Trust for Public Land and local land trusts will be strengthened. These actions will enlarge the portfolio of protected properties, ensure adequate support for staff and future potential litigation.

Looking to the future, a large increase in easement activity may result in the need for a staff member to devote 50% or more of his or her time to easement origination, administration, and programs, as is the case with some other statewide preservation nonprofit organizations.

To expand its impact into new areas, the Trust will consider developing proposals for large-scale surveys, focusing on topics such as: Maritime Connecticut (including the Stratford Point Lighthouse, shown on a day it was open to the public, left), 20th-century schools (the Worthington Hooker School, center), or mid-century modernism (Yale’s Beinecke Rare Books & Manuscripts Library).
During a celebration of the Barns survey program, former director of the Trust’s Barns program and current State Historic Preservation Office staff member, Todd Levine, recognizes the work of Sue Billing and Anne Roberts Pierson in preserving Billings Farm as a site for history education, open to all.
Goal 2: Engage & Inspire

To grow and enhance the preservation movement in Connecticut, the Trust must tell a compelling story about preservation that impels to action.

Being engaging and inspiring means:
• The Trust is seen as an active, inclusive organization that strengthens preservation across the state.
• The value of stewardship of the state’s historic assets is shared by all of Connecticut’s people, government, corporations, and non-governmental organizations.
• The Trust initiates programs and events that expand technical knowledge, reinforce strategic partnerships, and build community among many different stakeholders.
• The impact of historic preservation on Connecticut’s economy can be quantified and communicated.

The first gathering of Connecticut Women in Preservation, organized by the Trust’s female staff, drew dozens of women practicing preservation in the public, academic, and private sectors to Hartford’s recently-opened Hog River Brewery.
To engage and inspire, the Trust can renew or initiate efforts to:

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<tr>
<th>#</th>
<th>Strategy</th>
<th>Type</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Develop a Communications Strategy</td>
<td>Administration</td>
<td>Formalize a plan to better communicate the Trust's identity, values, and impact</td>
</tr>
<tr>
<td>B</td>
<td>Use Grants as Vehicles for Engagement</td>
<td>Incentives</td>
<td>Expand grant program both in size and reach</td>
</tr>
<tr>
<td>C</td>
<td>Use Awards as Vehicles for Engagement</td>
<td>Incentives</td>
<td>Showcase achievement in preservation through awards</td>
</tr>
<tr>
<td>D</td>
<td>Expand Type and Number of Educational Events</td>
<td>Education</td>
<td>Re-imagine trainings and workshops to attract more diverse audiences on new topics</td>
</tr>
<tr>
<td>E</td>
<td>Expand Type and Number of &quot;Friendraising&quot; Events</td>
<td>Engagement</td>
<td>Expose more people to the Trust, strategically working with partner organizations</td>
</tr>
<tr>
<td>F</td>
<td>Quantify Economic Impact of Preservation Programs</td>
<td>Survey</td>
<td>Commission report that successfully communicates the value of preservation to multiple audiences</td>
</tr>
<tr>
<td>G</td>
<td>Use the Boarding House to Highlight Best Practices</td>
<td>Education</td>
<td>Educate on best preservation practices while inspiring investment in the Boarding House</td>
</tr>
</tbody>
</table>

More information about each of these strategies follows.

**A. DEVELOP A COMMUNICATIONS STRATEGY**

The Trust has an intrinsically rich public identity, or “brand,” which appeals to a diverse group of partners, donors, and new audiences. The Trust must develop and integrate a formal communications strategy to ensure that it maximizes its potential to inspire and engage, while creating a foundation for long-term institutional stability and effectiveness. This Strategy has four parts.

1. Define and articulate the Trust’s identity

The Trust will undergo a formal exercise to clarify its distinct purpose, values, and impact. The general public does not necessarily distinguish between the Trust, the State Historic Preservation Office, and local historic commissions and societies. The Trust must better convey that it is a private sector organization without regulatory authority, which is responsive, informed, and objective – and which is here to help.

The values of the Trust, too, must be better communicated. Our work encompasses the values of economic development, heritage, community engagement, aesthetics, and learning. We should be more explicit about how these values drive our organizational priorities. Similarly, we should do a more effective job articulating our impact, as well as articulating the impact of historic preservation in general, a concept discussed below, in Strategy F.

2. Develop external messaging tailored for specific purposes and groups

After we define and articulate the Trust’s identity, we will develop inclusive messages which create awareness of the Trust and foster support of the Trust’s mission among diverse audiences. An “elevator speech” will be distributed annually to staff and Board members.

These messages will also be tailored to the specific groups of partners, constituencies, corporations and individuals in support of existing programs and the diversification of sources of revenue initiative. Other strategies, like adding plaques to any building on which the Trust has had an impact, should be pursued.

3. Target media, events, and programs to deliver this message

After we develop tailored messages that effectively communicate the Trust’s purposes, values, and impact, we will target media, events, and programs to get these messages out in a cost-efficient way.
4. Review the Trust’s web and social media presence

The Trust’s web and social media presence can be enhanced to better support the Trust’s internal operations, external communications, and fundraising needs. The review will include identification of new audience and potential reach, goals for engagement, and a plan for integrating web and print communications. It will also consist of a review of the IT infrastructure supporting Trust operations, with an eye to identifying impediments to effective staff utilization of IT infrastructure. Both these reviews will be conducted on a pro bono basis by appropriate external consultants.

B. USE GRANTS AS VEHICLES FOR ENGAGEMENT

The Trust manages and distributes two types of grants to nonprofits, local governments, religious institutions, and other entities: pre-development grants that help get projects off the ground and capital grants that fund built assets or infrastructure.

These grants, usually funded by the State and private foundations, are awarded on a competitive basis following reviews by the Trust’s staff and Board. Pre-development grants awarded in the last five years include: Historic Preservation Technical Assistance Grants (HPTAG),

INDIVIDUALS REACHED BY THE NUMBERS:

Facebook: 3,510
Email List: 2,676
CT Preservation News: 1,800
Twitter: 987
Instagram: 258

Maisa Tisdale, president and CEO of Bridgeport’s Mary & Eliza Freeman Center for History, accepts a check from the Trust for architectural planning in 2014. This planning ultimately resulted in historic homes built by African-American women to be rehabilitated. Tisdale now sits on the Trust’s board.
Vibrant Communities Initiative (VCI), and Making Places Grants that are integrated with our industrial heritage survey. Capital grants awarded in the last five years include: 1772 Foundation grants for nonprofits (especially locally-operated house museums), Maintenance and Repair (M&R) grants for public and religious structures, and Barns Grants.

Over the past five years, the Trust has awarded and recommended grants to 271 applicants amounting to nearly $3.5 million, and leveraged an additional investment of at least $6.1 million in the state’s historic places.

Demand for Trust grant programs outpaces supply, as there are always more worthy projects than funding available. In the last five years, there were five applications for every two awards, and only about half of the funding requested was granted. As funding from the State of Connecticut wanes, the Trust is seeking new partners for its grants program.

Despite its tremendous impact, the grant program has not boosted the Trust’s name recognition as much as it could. Associating the Trust’s name with the meaningful impacts of its grants can attract more people to the organization and the values it aims to serve. As part of its communications plan, the Trust will identify opportunities to better publicize the impact of the grants, whether through press, events, or physical plaques. At the same time, the Trust will require rigorous reporting by grantees so that it can better understand and publicize the full impact of its investment.

C. USE AWARDS AS VEHICLES FOR ENGAGEMENT

The Trust presents awards annually to recognize significant achievements and to publicize historic preservation. The three awards given to one individual, group, or formal association include:

- Harlan Griswold Award: for “leadership, vision and selfless dedication to preserving Connecticut’s heritage,” presented jointly with the State Historic Preservation Office and considered Connecticut’s highest recognition for preservation
- Janet Jainschigg Award: for preservation professionals
- Mimi Findlay Award: for young preservationists

In addition, multiple Connecticut Preservation Awards are given each year to individuals, nonprofit organizations, or entities for outstanding achievements in preserving historic places or for effective leadership in preservation.

The general public has shown significant interest in the Trust’s awards. There have always been far more nominations than awards, and attendance at the annual ceremonies has hovered around 150 people. In 2017, the Trust decided to hold its award ceremony in both Hartford and Fairfield Counties – which allowed even more to celebrate preservation successes. The Trust will continue to invite new audiences to participate in its awards and work through its communications plan to expand its impact through different media.
The Trust offers educational trainings and workshops on topics including law, maintenance and repair, real estate finance, and architecture. These programs are well-known and well-liked, with over 90% of respondents in a 2017 survey expressing knowledge about them.

One of its longest-running programs is a training workshop for commissioners of local historic districts, co-sponsored by the State Historic Preservation Office. Since 2013, the Trust has managed 15 training sessions, each in different towns, which have been attended by 301 commissioners and members of the public. More recently, the Trust has highlighted our state’s industrial heritage through the Making Places program – making 15 presentations in all 8 counties, with estimated live and online audiences of over a thousand people.

For many years, the Trust ran a “House Talk” series which involved a focus on individual houses. Technical workshops on wood windows and lead paint have also been conducted, some in coordination with the Preservation Education Institute.

Various constituents have suggested additional trainings or events focused on the following topics:

- Sustainability and resiliency issues
- Rehabilitation tax credits for homeowners, particularly in Fairfield County
- Homeowners’ insurance for historic properties
- Updates on projects funded by the Trust
- Revival of “House Talks” or a similar program
- A book tour for Connecticut Architecture
- Workshops for real estate professionals which focus on architectural assets as “selling points” and on financial incentives for homebuyers
- Early-career craftsmanship and building skills
- Dating historic buildings
- Strategies for researching historic properties
- Interpretive lectures on current historical issues

Offering workshops online may increase their value and expand their reach. Partnerships with federally-recognized tribes, public libraries, the State Historic Preservation Office, and real estate associations should be explored. Continuing education credits for planners, architects, and real estate professionals should be coordinated. Topics that appeal to youth, persons of color, and low-income persons should be prioritized.

Public events, centered around beloved places all over
the state, have the potential to raise the visibility of the Trust and inspire new people to care about preservation.

Over the last two years, Trust staff has made a concerted effort to expand its “friend-raising” events. A kayak tour of the Connecticut River, bike tour of Making Places program sites, and tour of Plum Island have aimed to engage current supporters and introduce the Trust to new groups of people with overlapping interests. The women of the Trust staff have also organized several popular “Connecticut Women in Preservation” happy hours. These less formal events are offered free to the public or at a nominal charge, and have proven popular.

We have also held more structured events. The Trust’s First Annual Golf Classic was held at the historic Shenecossett Golf Course in Groton. We had 39 golfers and an additional 10 people for dinner later in the day. There were 22 sponsors including businesses, nonprofits, and a foundation that made the day possible. We also held a two-hour open house for a Marcel Breuer property in New Canaan, which was very popular.

Board members and others have begun to envision new events to inspire and engage. A photography contest, exhibit, and related event is just one example. Larger events hold greater potential for corporate sponsorship and may help with fundraising.

F. QUANTIFY ECONOMIC IMPACT OF PRESERVATION PROGRAMS

In 2011, the State Historic Preservation Office commissioned an economic impact study from Place Economics, a nationally recognized firm, focusing on the contributions made by rehabilitation projects to the local economy. That study, “Investment in Connecticut: the Economic Benefits of Historic Preservation,” reviewed the impact of tax credit programs and grant programs (including the Community Investment Act) in the state. The study found that, over the preceding decade, the private sector invested more than $450,000,000 in preservation projects, resulting in a total of 6,560 jobs.

It is time to update this study to reflect the robust investment made in historic properties and programs in the intervening years. The Trust will continue to demonstrate the significant positive economic impact of
historic preservation on property values, job creation, tourism revenues, and downtown revitalization.

This is a top priority because the need for data is constantly being reinforced or requested in various contexts. Completing an economic impact study will be extremely helpful to the Trust’s fundraising goals. It will also aid the coalition of nonprofit organizations supporting the Community Investment Act during times when the state legislature is making difficult budget choices.

G. USE THE BOARDING HOUSE TO HIGHLIGHT BEST PRACTICES

The Trust’s headquarters building – also known as the Eli Whitney Boarding House – is a major asset and part of the Trust’s public image, as well as a prominent physical presence viewed by passersby. Stewardship of the Boarding House by the state’s leading advocate for stewardship of historic places is both a challenge and opportunity.

Listed on the National Register of Historic Places and designated as an Official Project of the Save America’s Treasures Program, the Boarding House has served as the Connecticut Trust’s headquarters since 1989. Built in 1827, it is the only surviving residential structure of the industrial village centered on Eli Whitney’s Armory along the Mill River.

The Trust has always used the Boarding House to highlight best practices in building conservation. When “Friend-raising” events that aim to inspire and engage include (clockwise from top left): bike tour of the Making Places program, a kayak tour down the Connecticut River, a tour of Plum Island, and the Inaugural Trust Golf Classic in Groton.
the Trust acquired the building in 1989, it had been covered with wood shingles and had lost most of its original sash. After removal of the siding and careful reconstruction or rehabilitation of the original sash, the Trust moved in.

In 2008, all of the building’s windows were restored and weatherized. That process increased the building’s energy efficiency, while retaining historic fabric, proving yet again that restoration of historic windows rather than replacement is a viable and favored option. The Trust also conducted a surface restoration, clapboard repair, painting, and storm windows installation.

More recently, energy efficient lighting retrofits and a highly visible rooftop solar panel installation are saving the Trust money and linking our work in historic preservation to the sustainability movement. As noted elsewhere, this link is a priority for the Trust.

In the near future, the Trust will undertake a much-needed evaluation of the building by generating a maintenance and preservation plan. This effort affords opportunities for public workshops and public documentation of progress via social media.

The Trust will use the Boarding House to demonstrate best practices to our constituency of how we plan, budget, and raise funds for stewardship. In addition, we can test technical and practical matters, such as monitoring the performance of sample building materials and finishes.
Goal 3: Strengthen Organization

The Connecticut Trust for Historic Preservation must ensure that it remains a strong organization with regard to four key areas: finances, membership, staff, and board.

What does being a strong organization mean? It means:
• The value and visibility of the Trust’s work attracts financial support from a wide range of sources, and a growing endowment supports our programs and projects.
• The Trust’s membership grows and becomes more engaged.
• The Trust’s staff remains one of the most knowledgeable, effective, and enabled groups of professional preservationists in the United States.
• The board of trustees flourishes, with increasingly diverse perspectives and backgrounds.
Being a strong organization requires targeted initiatives that aim to:

<table>
<thead>
<tr>
<th>#</th>
<th>Strategy</th>
<th>Type</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Diversify Sources of Revenue</td>
<td>Fundraising</td>
<td>Ensure financial stability</td>
</tr>
<tr>
<td>B</td>
<td>Build an Endowment Fund</td>
<td>Fundraising</td>
<td>Provide a stable source of funding for Trust programs</td>
</tr>
<tr>
<td>C</td>
<td>Increase Membership</td>
<td>Engagement</td>
<td>Expand reach of the Trust to new audiences</td>
</tr>
<tr>
<td>D</td>
<td>Embrace Staff Talent</td>
<td>Administration</td>
<td>Recruit, retain, and promote our talented staff</td>
</tr>
<tr>
<td>E</td>
<td>Initiate an Internship Program</td>
<td>Administration</td>
<td>Cultivate new leaders in preservation through formal partnerships with area universities</td>
</tr>
<tr>
<td>F</td>
<td>Recruit a Diverse and Active Board</td>
<td>Administration</td>
<td>Expand reach and impact of Board as key ambassadors of the Trust</td>
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More information about each of these strategies follows.

**A: DIVERSIFY SOURCES OF REVENUE**

**B: BUILD AN ENDOWMENT FUND**

As the Trust approaches its 50th anniversary in 2025, securing its financial standing through diversifying sources of revenue and building an endowment is one of the most important outcomes of this Plan.

Our emphasis on these two strategies stems from recent shifts in priorities for the public funding on which the Trust relies. In particular, State funding for historic preservation purposes has been reduced, and the funding that remains has not been consistently available. At the same time, the federal government does not invest directly in nonprofit organizations. In short, we cannot plan on stable or increased government financial support for preservation organizations like the Trust.

A greater diversity of revenue will provide stability, enabling the Trust to sustain its mission through periods where one or another source of revenue is limited – and help ensure its vibrancy for another 50 years. To this end, the Trust will target five sources of revenue:

1. Individual and membership gifts

As the Trust has become more reliant on public financial support over the last five years, annual giving as a percentage of total revenues has decreased. Enlarging the base of small, recurring gifts and memberships will support programs of the Trust and engage citizens of Connecticut directly in supporting preservation. Properly cared for, many of today’s small donors will become larger donors in the future. To achieve this outcome, a first step is to expand and retain membership to attain the goal of raising $100,000 by 2023.

2. Major gifts earmarked for endowment

Typically, institutional endowments are the result of larger, periodic gifts rather than smaller, annual gifts. With this in mind, the Trust will launch a major gifts program. This program will seek a small number of gifts in the $250,000 to $500,000 range each year that will move the endowment to critical mass. The primary source of these gifts will be wealthy individuals, corporations, and foundations. In contrast to the annual giving campaign, the major gift program will be based on informed prospecting and development of donors over several years. The objective will be to create a gift funnel from which a small number of large gifts emerge on a regular, but not strictly calendar, basis.

Through these efforts, the Trust will develop an entirely new source of revenue: endowment income. The current endowment fund will be built up from the major gifts program and planned giving. The endowment will be invested in equity, fixed income, money market, and other funds. When the endowment reaches an appropriate size, the Trust will take a portion of the endowment’s return and use this income each year to support the programs and operations of the Trust. The Trust will target an endowment of $2 million by 2023 and $6 million by 2028. How the endowment will be invested, when the Trust will start taking investment income into
operations, and what portion of investment returns to take as income will be set out in an investment policy to be developed and approved by the Board.

3. Planned gifts

Planned gifts, such as bequests, are less predictable but often provide meaningful support and serve to grow endowments. When the seeds are planted over time, planned giving could deliver between $200,000 and $700,000 each year. The Trust will establish a recognition group which includes individuals who have set up a bequest to the Trust in their estate plan. The names of members of this recognition group will be included in Connecticut Preservation News each year.

In addition to bequests, there are more sophisticated forms of planned giving. These types of gifts benefit both the Trust and the donor and include charitable gift annuities, charitable remainder trusts, and donor managed investment accounts. These arrangements require expertise and capacity the Trust does not currently possess. They are also dependent on the tax code. The Trust will investigate the attractiveness and feasibility of promoting these other forms of planned giving.

4. Preservation services

The Trust provides services for which it charges fees: tax credit loans, consulting, and easements. The purpose of these services is to advance the core mission of the Trust to protect historic properties. The goal of enhancing and expanding these programs is congruent with the goal of achieving a larger, more diverse mix of revenues.

5. Fundraising from events and other sources

The Trust will raise revenue through events, such as talks, tours, dinners, and benefit sporting competitions, which are aimed at owners of historic properties, members of local preservation organizations and other preservation enthusiasts. While the net revenue will be small relative to other revenue sources, these events provide a means of engaging with existing members and expanding our base of support to new members, young members, and communities with whom the Trust has not previously engaged. There is also the potential for fundraising through the sale of license plates recognizing the state’s historic heritage, to benefit the Trust.

C: INCREASE MEMBERSHIP

Annual dues-paying members have remained stable in number, at around 1,100 over the past decade. During this time, the Trust’s expanded programs have reached new partners, but our membership has not increased. We will study the causes of this stagnation, perhaps with an ad hoc committee, and assess how the Trust can ensure that it expands the pool of potential members. Through the communications strategy, we will better communicate the strength and value of the Trust. It could be that membership growth has slowed as demographics have changed and our membership has aged.

This Plan proposes that the Trust embark on an effort to increase the number of members through explicit solicitations and engagement (discussed elsewhere).

D: EMBRACE STAFF TALENT

The Trust is fortunate to have a cadre of eight highly-talented and collegial staff. They have bachelors and
masters degrees in architecture, applied historic preservation, maritime studies, education, European history, urban planning, journalism, history museum studies, American studies, and geography, among other fields. They have led local historical societies, served as curators at art museums, provided independent consulting services, served on state review boards, served as archivists, worked in design studios, and worked in multiple states. Half of the staff has been with the Trust for over ten years. The level of commitment and experience of the staff of our small organization is truly extraordinary.

It is clear from the surveys we received as part of this planning effort that many agree the Trust’s staff is one of its greatest assets. The survey responses were overwhelmingly supportive of staff initiatives and programs, including the Circuit Rider program, community engagement activities (like kayaking and bike tours), and the launch of our Women in Preservation platform. Staff should continue to be supported in imagining and planning new initiatives.

In addition, to ensure a strong organization, staff must be given opportunities to grow through training and certification programs, and through the networking and educational opportunities provided at regional and national conferences.

Promotion from within has become a Board priority and, intended to foster staff retention. For example, the Board promoted longtime preservation services director, Jane Montanaro, to co-executive director in early 2018. She now focuses on internal issues, while Wes Haynes, a former Circuit Rider, focuses on external affairs. The deputy director, Chris Wigren, has expanded his portfolio with his pioneering book, *Connecticut Architecture*. In addition, in 2015, Circuit Rider Greg Farmer was appointed to serve as the executive director of the Revolving Loan Fund.

Identifying opportunities in promotion and training for our more recent hires is particularly important for the retention and morale of our excellent staff.

E: INITIATE AN INTERNSHIP PROGRAM

By developing a formal internship program, the Trust can benefit from undergraduate and graduate intern assistance, while at the same time growing the next generation of historic preservation leaders. Interns can...
engage with a broad range of issues related to historic preservation: policy, law, planning, data analysis, economics, and sustainability. They might also help the Trust explore new opportunities to educate and engage younger audiences – in elementary, middle, and high schools – on historic preservation.

Possible local educational partners include Central Connecticut State University, Connecticut College, UConn, Mount Holyoke College, Trinity College, Yale, Williams College, and Roger Williams University. There may be enthusiasm among funders to provide modest stipends for an internship program. Special attention should be paid to applications from women, minorities, veterans, and persons with disabilities.

F: RECRUIT A DIVERSE AND ACTIVE BOARD

The Board and Advisory Council of the Trust have always included some of the state’s most influential preservationists. Both groups can boast geographic diversity: members hail from our largest cities to our smallest towns, from the Quiet Corner to the Gold Coast. Similarly, professional diversity is strong, with members active in finance, strategic consulting, preservation technical services, estate planning, history, literature, woodworking, architecture, and law, among other areas. Unfortunately, there is further work to do, as the Board lacks racial and ethnic diversity, and skews older.

Active efforts must be made to change old patterns when recruiting new Board members and cultivating a new generation of preservation leaders. Ensuring that the members of the Board and the Advisory Council remain abreast of best practices in such areas as fundraising and advocacy may require external assistance.

Through the adoption and ratification of this Plan, the Board has committed to prioritizing Board and Advisory Council development and will incorporate regular evaluation of these goals in its plan of work.
Teamwork makes the dream work! The Trust’s success would not be possible without everyone pitching in.
A special thanks
to all who helped with this planning effort, from all of us at the Trust!

This effort depended on robust engagement of several constituencies: the Board and Advisory Council, members, partners, grants and loan recipients, and staff. From these constituencies, we received both quantitative and qualitative feedback, through consultation, committee meetings, and a survey that drew over 300 responses. Thanks to you, this strategic plan represents a shared consensus about where the Trust can move forward to more effectively fulfill its mission.

Staff

Director of Preservation Services and Operations:
Jane Montanaro
Director of External Partnerships: Wes Haynes
Deputy Director: Christopher Wigren
Communications & Advocacy Manager: Erin Marchitto
Membership Manager: Jordan Sorensen
Project Manager, Making Places: Renee Tribert
Circuit Riders: Gregory Farmer & Brad Schide

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Vice Chairman: Sara Bronin, Hartford
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Cesar Pelli, New Haven
John W. Shannahan, Suffield

Plan coordination: Board of Trustee members Sara Bronin and Peter Stockman. Graphic design: Sara Bronin. Photo credits: City of Waterbury (p. 8), Sara Bronin (two on p. 14), © Connecticut Post 2014 (p. 18), Todd Levine (p. 31), with all photographs remaining by Trust staff.
A scene from the Lebanon Town Green, which at a mile long is the largest town green in New England. The Trust is currently engaged in an effort to protect the Green in perpetuity through conservation and preservation restrictions.
The Connecticut Trust for Historic Preservation is a privately funded nonprofit organization, established by special act of the State Legislature in 1975. It preserves, protects, and promotes the buildings, sites, and landscapes that contribute to the heritage and vitality of Connecticut communities.