Becoming the Preservation Executive Director: A Journey Through the Educational and Professional Development of Preservation Nonprofit Leaders

Allison G. Bacon

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Becoming the Preservation Executive Director:
A Journey Through the Educational and Professional Development
of Preservation Nonprofit Leaders

Allison G. Bacon

Master of Science

Historic Preservation
School of Architecture, Art and Historic Preservation
Roger Williams University
May 2018
Signatures

Becoming the Preservation Executive Director: A Journey Through the Educational and Professional Development of Preservation Nonprofit Leaders

Allison Bacon         Date

_____________________________     _______________

Elaine B. Stiles, Thesis Advisor        Date

_____________________________     _______________

Arnold Robinson, Second Reader        Date

_____________________________     _______________

Stephen White, Dean of SAAHP        Date

_____________________________     _______________
Dedication

I dedicate this to the leaders who have made a difference in my life.

May you continue to see the inner potential in those unsure they can lead.
Acknowledgements

This work was made possible by the many preservation executive directors that took the time to share their insights into their positions. I am thankful for them taking the time out of their busy lives to participated in my survey and interviews.

My approach to this topic is due to Dr. Katrina Norvell at the RWU Providence Campus. Thanks to her Strategic Human Resources Management class, I was introduced to the job analysis method.

Thank you to my thesis advisor Elaine Stiles for her guidance through the past year. Her idea to survey preservation graduate programs and professional development programs proved vital to my analysis. Her understanding and vast preservation knowledge has taught me so much about the preservation world.

Another thank you to my second reader, Arnold Robinson, Associate Dean of Community Engagement at RWU. A chance posting for a historic preservation fellow mid-summer led me to my time at the CPC. His insights as a former executive director and data person were invaluable.

Lastly, I must thank Philip Marshall. From our initial phone call in 2014, while I contemplated the program still working at Disney, to our discussions during advising, he believed in my interest of nonprofit management and preservation when I felt it was insignificant. With his help I was encouraged to pursue this interest and I am thankful for his inspiration.
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Abstract

Historic preservation executive directors are tasked with using their preservation skills and knowledge to preserve and protect the built environment. However, they are also responsible for running a business, in the form of nonprofit organization, where they manage people, projects and budgets to keep the organization functioning. This thesis explores the necessary knowledge, skills, abilities, and other characteristics (KSAOCs) required of historic preservation executive directors to lead preservation nonprofits using the method of job analysis. Preservation graduate programs and educational standards are analyzed to demonstrate the gap in preservation academic programs to prepare professionals to lead nonprofit organizations. Recommendations are made to improve preservation education opportunities for preservation students and professionals.
Chapter One: The Historic Preservation Executive Director

Introduction

Preservation executive directors lead nonprofit organizations that make a difference in the community. With preserving the built environment their mission, they take their seats as leaders of these organizations to guide them through the advocacy work, fundraising and organizational management needs of preservation nonprofits. At the same time, aspiring preservationists attend academic programs to learn the knowledge, skills, and abilities necessary to be successful in the field. They learn the history and theory of preservation along with documentation and recording skills. Yet, depending on the program they attend, educational outcomes differ depending on the specialized focus of the educational program. Some programs favor conservation and curation while others focus more on planning and design. Most programs, however, do not cover nonprofit management as a specialized component. With many preservation professionals working in the nonprofit management realm, the knowledge and skills needed to run a nonprofit organization are mainly learned outside of an academic program.

This thesis describes how preservation executive directors gain the knowledge, skills, and competencies to strategically guide their organizations while understanding the existing state of preservation academic programs. Using the human resources method of job analysis, the preservation executive director position is analyzed in both a qualitative and quantitative study. By studying the directors through their point of view, conclusions are made regarding the necessary competencies of preservation executive directors. It also addresses how preservation executive directors gain their skills before they take these positions. By studying preservation education program requirements along with information supplied from the directors themselves,
conclusions are made about preservation education and its ability to inform the nonprofit
government aspects of heading a preservation nonprofit organization.

By addressing the gap between preservation education and the preservation executive
director position, key insights are learned to describe the unique professionals that come to
flourish in these positions. These leaders find themselves in roles that requires versatility and
visioning. Many times, they are the public face of an organization known within the community
and have the important task of maintaining multiple external relationships for the benefit of the
organization both financially and to meet its mission. A preservation executive director must
merge their preservation background within a position that requires nonprofit management
competence to become a successful preservation nonprofit leader.

**Literature Review**

Executive director literature addresses major competencies and skills needed to be
successful in leading organizations. The position brings with it great responsibility as the
organization relies on this leader for guidance. As stated by Dr. Emmett D. Carson, “…
executive leadership is perhaps the single most important component for understanding why
nonprofits, corporations, and governments succeed or fail in achieving their goals.”1 Executive
directors therefore must be proficient in a series of skills while being highly versatile in order to
propel the organization mission forward.

Executive directors have evolved to be more than a nonprofit manager. They are evolving
into leaders that act more like presidents or CEOs of companies. As described in *Governance as
Leadership: Reframing the Work of Nonprofit Boards*, nonprofit leaders earned their position due

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1 Emmett D. Carson, “On Leadership in the Nonprofit Sector,” in *Nonprofit Management 101: A Complete and
Practical Guide for Leaders and Professionals*, by Darian Rodriguez Heyman (Hoboken: John Wiley & Sons, Inc,
2011), 29.
to their passion for the organization’s cause. It was not their skills that promoted them into leadership but their commitment. Most often executive directors did not have experience in management, finances, labor strategies and investments. This has changed as today’s current executive director usually has formal training in nonprofit management, either through a graduate degree (business/organizational/nonprofit management) or an executive training program. As leader of the organization, donors, trustees, and employees expect the executive director to clearly define the organization goals while maintaining a successful business. The executive director does this by being able to work complexly and concurrently as they play multiple roles at once. While the executive director is managing and creating the organization’s budget, he or she must also be building relationships with donors and actively fundraising. The versatility of the executive director to effectively switch hats is important to his or her success.²

Fisher Howe in *The Nonprofit Leadership Team: Building Board-Executive Director Partnership* analyzes the executive director’s role through the executive-board member relationship. Traits that a board member looks for in an executive director are described as:

Table 1.1: Executive Director Traits in The Nonprofit Leadership Team³

<table>
<thead>
<tr>
<th>Trait</th>
<th>Definition</th>
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<tbody>
<tr>
<td>Vision</td>
<td>Long term insight and strategic outlook.</td>
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<tr>
<td>Initiative</td>
<td>Be a self-starter.</td>
</tr>
<tr>
<td>Proficiency</td>
<td>In the mission as well as human and financial resources.</td>
</tr>
<tr>
<td>Productivity</td>
<td>Delivers outcomes and services.</td>
</tr>
<tr>
<td>Communication Skills</td>
<td>Can write and speak well.</td>
</tr>
<tr>
<td>Openness</td>
<td>Transparent with the board.</td>
</tr>
<tr>
<td>Responsiveness</td>
<td>Able and willing to help the board be effective.</td>
</tr>
</tbody>
</table>

---

These traits provide the executive director the skills needed to run the organization while working effectively with the board. When the board also possesses these traits, the two can work together to make the best strategic decisions to further the organizational mission. The executive director will have more success by possessing these traits.4

Executive directors also need to be able to focus on how the organization functions both internally and externally. Burt Nanus and Stephen M. Dobbs in *Leaders Who Make a Difference: Essential Strategies for Meeting the Nonprofit Challenge* identify the directions of an organization that the executive director must learn how to balance and manage. The directions come from inside the organization, outside the organization, present operations, and future possibilities. Executive directors must keep all directions at the forefront of their decision-making to keep the nonprofit successful. Nanus and Dobbs identify six distinct leadership roles an executive director must play to reach this success. An executive director must first act as both a visionary and strategist as he or she is the direction setter for the organization. They then act as both politician and campaigner for the benefit of the organization’s constituents but also because they are passionate for the organization’s causes. Next, they must act as coaches as they create the team needed to support the mission and build trust within the organization. Lastly, the executive director is a change agent who is poised to position the organization for the future. A change agent is aware of changing dynamics within the organization’s field and is not afraid to take risks to keep the organization relevant. By balancing all these roles, the executive director becomes the organization’s guiding figure toward achieving the mission.5

4 Howe, 3–12.
Emmett D. Carson’s essay in *Nonprofit Management 101: A Complete and Practical Guide for Leaders and Professionals* describes skills the executive director must exhibit as well. Executive directors must be versatile leaders who can jump from role to role to keep their organizations afloat. They must maintain a vision of the future, take risks, and clearly communicate to ensure they cultivate a donor base and funding opportunities. Maintaining and refining these skills are vital to the executive director and it is important for them to actively pursue professional development. Carson states that a nonprofit organization’s success is highly tied to the ability of the executive director to lead. Without a qualified and strategic leader, the organization will have a much harder time obtaining goals.⁶

Mim Carlson and Margaret Donohoe in *The Executive Director’s Guide to Thriving as a Nonprofit Leader* list similar roles that the executive director must fulfill as mentioned in the previously stated scholarship. They state the five roles an executive director must play are visionary, change agent, relationship builder, community creator and resource wizard. Visionary again is listed as important as it is a role that requires motivating all stakeholders and bringing focus to the organization’s vision through strategic guidance. Change agent appears again and is described as aware and up-to-date with changing community needs, financial changes, and emerging competition. Change agents are willing to take risks and encourage staff to be on board with the change. Relationship builder is a role that requires clear communication and fostering healthy relationships within the organization with employees and the board of directors. This is combined with the fourth role, community creator, which focuses on building partnerships outside of the organization along with valuing diversity within the organization. Resource Wizard is the last role, where maintaining and cultivating funds and donors is realized. By

fulfilling all these roles, the executive director becomes the versatile leader of the nonprofit organization.\textsuperscript{7}

Carlson and Donohue also mention the importance of nonprofit executive directors participating in professional development activities. Activities include participating in workshops and conferences that focus on management or leadership, finding an executive director support group, finding a mentor, obtaining an academic nonprofit certificate or degree as well as staying up to date on relevant articles and books for executive director professional development. The executive director must constantly pursue professional development opportunities to become more proficient in their skills, but also to ensure they are staying current within the nonprofit field. Evolving nonprofits to meet new demands is a major responsibility of the executive director.\textsuperscript{8}

Yet developing one’s self to become an executive director is more difficult as established career paths within nonprofits are rare. Carlson and Donahue state that professionals within nonprofits see promotions within the same organization only when it is a larger nonprofit. More often nonprofits are small and do not have the opportunity for advancement from within. Instead some professionals will jump from nonprofit to nonprofit performing the same job to gain more experience. Other professionals choose to move to different jobs at different nonprofits, sometimes taking a demotion in order to gain more skills. In the nonprofit sector, less resources and smaller budgets make professional development more difficult to pursue. It becomes a personal choice where the professional has to take initiative to ensure they are growing their skill set, pursuing trainings, attending conferences, and reading new literature to become proficient in

\textsuperscript{7} Mim Carlson and Margaret Donohue, \textit{The Executive Director’s Guide to Thriving as a Nonprofit Leader} (Hoboken: John Wiley & Sons, Inc, 2010), 4–8.
\textsuperscript{8} Carlson and Donohue, 16.
new skills. Becoming an executive director within a nonprofit differs from corporate culture where internal development and promotion of staff is common practice.9

The scholarship reveals that executive directors have a complex job that require them to utilize many skills interchangeably. To propel the organization forward, the executive director must act as a visionary. He or she achieves this by visualizing the future and creating the strategic outlook for the organization. Along with being a visionary, the executive director has to be a self-starter and a change agent. Organizations have to remain relevant in an evolving world which requires action to be aware of changes in the workplace. The executive director must be a risk taker to keep the organization from becoming stale in its goals or within its relationship with the community. Building relationships within the community is another skill the executive director uses to reach success. He or she must also make and maintain relationships with staff, the board of directors and external organizations. These relationships help the organization meet goals while also providing services to their partners. Fundraising and finding financial resources and donors is more successful with established relationships. The position requires proficiency in both human resources and finances to ensure the business can operate. Communication skills in both speaking and writing are used throughout the executive director’s skill set. The ability to use multiple skills at one time and to be flexible in different situations means the executive must be versatile at all times. Along with a passion for the organization’s mission, the executive director leads the organization both as its business and thought leader.

In contrast to executive director and nonprofit management scholarship, preservation-specific nonprofit management scholarship is minimal. Preservation literature is dedicated to

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material and technical aspects of preservation such as conservation, rehabilitation, and history. The leadership skills needed to successfully run an organization are rarely discussed or studied, though many preservationists end up working in nonprofit organizations that require effective management of an organization. Understanding treatment of historic properties or how to complete a National Register nomination does not help preservationists learn how to balance a budget or fundraise. Within existing scholarship, a single chapter within a book was found that looks at preservation nonprofits directly.

Virginia O. Benson and Richard Klein discuss preservation nonprofit organizations in Benson’s book *Historic Preservation for Professionals*. The chapter describes the preservation nonprofit leader as working within the physical, economic, and social application of the built environment. Professionals in this part of the field must be prepared to justify preservation’s positive impact at any time. These nonprofits can be local, statewide, regional, or national in size, but all prosper due to their leadership. Benson and Klein make the case that, “Nonprofit organizations are only as effective as their leadership.” The chapter notably does not call out any other skills related to leadership but infers needed preservation skills. These skills are architectural knowledge, regulatory understanding of the built environment, real estate expertise, budgeting, grant writing, and advocacy skills. Benson and Klein state that, “two characteristics are particularly relevant for the [historic preservation nonprofit professional]: the leaders of these organizations have a passion for historic preservation and an ability to strategically accomplish their goals and objectives.” Their view is similar to that stated in executive director literature, but they fail to more thoroughly describe what skills these leaders use to meet organizational

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11 Benson, 99–111.
goals. Being an effective preservation nonprofit leader requires acquiring both nonprofit management and preservation-related skills and training.

Nonprofit management skills are often neglected within preservation academic programs as well. Though bachelor’s degrees in historic preservation are offered in academia, nonprofit organizations most often look for professionals with a historic preservation master’s degree to identify those with necessary preservation training. As Dr. Jeremy Wells illustrates in his article “Social Science Research Methodologies and Historic Preservation: Broadening the Possibilities for a Preservation Thesis,” career possibilities for preservation graduates fall into four categories: regulators, conservators, interpreters, and stewards. Regulators must manage community values with design value as planners or historic preservation officers. Conservators balance expert values with design values to maintain authenticity. Interpreters blend expert values with age value while working with museums and historic sites to engage the public in preservation. As stewards, executive directors are interested in education and advocacy to help protect the historic fabric for the community’s benefit. There is no mention of the need to know how to manage an organization as an executive director. His study helps show that preservation education does not find it necessary to understand nonprofit management skills to become a successful preservationist in the highly interdisciplinary field.12

Research establishing the preservation and nonprofit management competencies of the twenty-first century preservation executive director has not been completed. Becoming the preservation executive director means the leader must possess the leadership and management skills that a nonprofit leader needs to maintain a functioning organization but should also have

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preservation knowledge to be successful in preservation-specific tasks. This thesis aims to
determine what mix of preservation and nonprofit management skills a preservation executive
director needs along with how those skills are likely to be obtained. When trained in both
nonprofit management and preservation competencies, the preservation nonprofit leader is best
prepared for his or her career.
Chapter Two: Methodology

In order to establish the competencies of the twenty-first century historic preservation executive director (HPED), this study will investigate the educational and professional backgrounds of current and past HPEDs along with their acquired competencies. The study uses the method of job analysis to obtain data on the HPED background and job function to make conclusions about the position. The study first addresses the gap in preservation education to prepare preservation professionals for nonprofit management positions. A survey of graduate historic preservation programs is completed to identify what skills are being taught to aspiring preservation professionals. Together, the information allows conclusions to be made about the educational and professional journey to become a HPED.

Preservation Education Analysis

A survey of graduate historic preservation academic programs will be performed to address if nonprofit management skills are included in the curriculum requirements. The National Council for Preservation Education (NCPE) “reviews” academic historic preservation programs to meet their standards, however there is a great disparity between academic institutions approach to preservation. Analysis of preservation graduate programs course offerings and curriculum requirements was completed to determine if nonprofit management courses are offered within preservation programs. If courses were offered, they were listed for the analysis as required or elective courses to determine their importance to the program. Specific tracks or certificates offered within the graduate degree were also recorded for the analysis.

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13 HPED will be used through the text to refer to the historic preservation executive director.
The data collected from the graduate program analysis will be used to determine if preservation graduate programs successfully prepare students to become HPEDs, or knowledgeable of nonprofit management. Available professional development opportunities were also analyzed. At the completion of the study, the determined HPED knowledge, skills, abilities and other characteristics (KSAOCs) and training requirements created from the job and graduate program analysis will be used to craft conclusions on preservation graduate programs regarding nonprofit management education through a list of recommendations for preservation education.

**Job Analysis**

Job analysis is commonly used within human resources departments to identify the existing state of their human resources as well as what human resources they project to need in the future. As defined by Joan E. Pynes, “A job analysis is a systematic process of collecting data for determining the knowledge, skills, abilities, and other characteristics (KSAOCs) required to successfully perform a job and make judgments about the nature of a specific job.”\(^{15}\) A complete job analysis will look at the job’s activities and tasks along with the context in which the job is performed. It will also look at the personal requirements of the position, which could include interests, physical characteristics, personality, and job-related knowledge and skills. It helps provide a more complete view of the position within the organization, which in turn helps the organization make strategic decisions to advance itself.\(^ {16}\)

Job analysis will be used in this study to identify the minimum KSAOCs and education/training requirements for an HPED. Other uses for the method include analyzing

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\(^{15}\) Joan E. Pynes, *Human Resources Management for Public and Nonprofit Organizations: A Strategic Approach* (Somerset: John Wiley & Sons, Incorporated, 2013), 142,

\(^{16}\) Pynes, 142.
compensation, determining on-the-job and career development training for employees, identifying measures of performance evaluation, and determining a job’s design. Usually a job analysis is conducted primarily to create an accurate job description and specifications for a position. Job analysis in this paper will aim to analyze existing HPEDs KSAOCs as well as their professional and educational background. At the conclusion of the quantitative and qualitative analysis, the most identified KSAOCs and educational/training requirements will reveal the most important traits of a HPED.\textsuperscript{17}

A variety of data collection is needed during a job analysis. For the purpose of this study, data collection will include:

- Internet-based research: Internet-based research looks at existing information and data about the position.
  
  - Job Classification: The U.S. Department of Labor’s Occupational Information Network (O*NET) hosts information on hundreds of jobs. The “Chief Executive” classification within O*NET is used for Executive Directors and was used for this study. Other internet-based research includes looking at existing job descriptions.
  
  - Job Description Survey: Analysis was conducted using PreserveNet, a Cornell University affiliated website that hosts preservation-related job descriptions dated back to 2009.\textsuperscript{18} The job description analysis required quantitatively analyzing the KSAOCs and training requirements of twenty-five recent job descriptions. The most common mentioned traits

\textsuperscript{17} Pynes, 142–44.
and requirements are therefore, the most important to the HPED. They were broken up into three core types of preservation nonprofits: local organizations, Main Street organizations, and statewide/national organizations. Educational requirements were also analyzed using this information.

- **Survey:** Surveys allow data to be collected from people within the position as well as subject matter experts and supervisors about the existing role. A survey was created for this study to anonymously gather information from current or prior HPEDs. It asked questions about the subject’s educational background, professional background, and about the traits they felt are most important in their position. This was done through structured checklists as well as open-ended questions which can be found in Appendix A. Subjects were also asked to describe the tasks of their position. Commonalities in data show the more necessary traits of the HPED, while qualitative data gives insight into the actual role a HPED plays in their position. Subjects were recruited through the National Trust for Historic Preservation’s Preservation Leadership Forum, as well as direct e-mail communication.

- **Interview:** Interviews are another way to gather information during a job analysis. Interviews were used to help give more direct insight into a HPED’s journey to their position and used as an alternative to complete the survey. Interview

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19 A copy of the survey questions along with the Informed Consent Form can be found in Appendix A and Appendix B.
questions can be found in Appendix B. Interviewees were located on the National Trusts’ Preservation Leadership Forum as well.

The overall job analysis will result in a more defined description of who the HPED is and what KSAOCs are needed for the position. It will also determine the educational and professional training specifications necessary for the position.
Chapter Three: Preservation Education Analysis

Historic preservation education standards vary from program to program. Since preservation is an interdisciplinary field, academic programs that teach preservation vary in their approach to education depending on the school or department the program resides in. This chapter looks at the standards for academic preservation programs created by the National Council for Preservation Education (NCPE). The standards are the minimum requirements for an academic program in preservation to become a recognized member within NCPE. The minimum standards cause preservation programs to vary in program requirements and course offerings. Because of the variations and the minimum requirements specified by NCPE, a survey of preservation graduate programs is conducted to identify if nonprofit management skills and competencies are taught to aspiring preservation professionals. The chapter determines if preservation graduates are educated in the skills needed to be a historic preservation executive director (HPED).

National Council for Preservation Education

The National Council for Preservation Education (NCPE) is a body of preservation professionals and educational institutions that have an interest in the existing and future state of preservation education. Preservation academic programs are not accredited or certified by any board and the profession does not require a professional license to operate. Instead, preservation academic programs become recognized members of NCPE when their program requirements meet the membership standards.20 A program recognized by NCPE is seen by professionals as providing the education needed to become a preservation professional. However, preservation as

a field is very interdisciplinary and provides many different job possibilities. NCPE accounts for this through its membership standards, which are open-ended and leave room for different approaches to preservation education. Standards are described as:

“The Council expects that all programs will provide instruction in, or require as a prerequisite, the following skills and knowledge deemed common and essential in the field of historic preservation:

• Instruction equivalent to at least two (2) courses in the history of the designed environment (including, for example, the history of architecture, urban development, landscape architecture, archeology, or material culture).

• Instruction equivalent to at least one (1) course devoted to the history and theory of preservation.

• Instruction equivalent to at least one (1) course devoted to documentation and recording techniques used in preservation and archeology.

• Since preservation required the field application of knowledge, including communication skills, the program should encourage a significant period of practical experience, equivalent to an internship, practicum, or apprenticeship.

• Instruction in at least one Specialized Component (design, technology, economics, law, planning, and curation).”

The membership standards require four specific courses and at least one specialized component. This leaves room open for preservation programs to vary widely. A program at one university may cover curation while another program does not have any course work regarding the subject.

The specialized component standard causes preservation programs to specialize in different skills and offer a non-standardize education overall. Only history of the designed environment, history and theory of preservation, and documentation and recording techniques must be taught within all preservation programs. The standards leave much room open as to what preservation skills are needed to become a preservation professional.

The NCPE standards do not address nonprofit management skills. Though not all preservationists end up working in nonprofits, preservation nonprofit organizations are a major player in the preservation world. Some skills not addressed are management (of people and projects), fundraising, budgeting, and building relationships. Though budgeting and finance could be covered under the specialized component of “economics,” it is not a required component of all programs and may be more building or project specific rather than organizational. Management, budgeting and building relationships are skills necessary in many preservation professions beyond nonprofits.

The NCPE standards do address teaching communication skills. The standards suggest this skill can be gained through practical experience. Practical and internship experience however do not guarantee the acquiring of communication skills if learning objectives are not established and later evaluated. A conscious effort within the preservation academic courses must be added to develop the communication skills needed for preservation and nonprofit management competence. The NCPE standards leave room for preservation programs to vary greatly across academia.²²

²² National Council for Preservation Education; Wells, “Social Science Research Methodologies and Historic Preservation.”
Graduate Program Analysis

To determine how NCPE membership standards are interpreted within academia, analysis was performed to look at the existing condition of preservation graduate programs. Graduate level programs were examined as they provide a more focused preservation education within an average two-year program compared to bachelor programs which must also meet general education requirements. Program requirements were evaluated to determine if nonprofit management courses were offered and in what capacity. The study illustrates the lack of education in nonprofit management competencies for preservation graduate students.

Using NCPE’s Academic Search webpage, 34 graduate preservation programs were determined to be active. Programs researched are listed in Table 3.1. The program requirements for each academic program were located within the university’s website or within the school’s course catalog. The course offerings were evaluated by course name as well as course description when available. Course offerings were analyzed using the nonprofit management skills in Table 3.2. Course offerings that taught nonprofit management skills were then categorized into required and elective courses.

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24 Cal Poly Pomona was not included due to it being of a Master of Architecture with a concentration in historic preservation. George Washington University’s program was not included as it is a degree in “American Studies.” Delaware State University, Texas Tech University, and University of North Carolina Greensboro programs do not exist within the university’s respective websites.
25 Data was unable to be determined for four graduate programs: Plymouth State University, Rutgers University, University of Florida and University of Illinois at Urbana.
Table 3.1: Graduate Preservation Programs in the United States

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<td>Ball State University</td>
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<td>Boston Architectural College</td>
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<td>Boston University</td>
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<tr>
<td>Clemson University &amp; College of Charleston</td>
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<td>Colorado State University</td>
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<td>Columbia University</td>
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<td>Pratt Institute</td>
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<tr>
<td>Roger Williams University</td>
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<tr>
<td>Rutgers University</td>
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<tr>
<td>Savannah College of Art &amp; Design</td>
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<tr>
<td>School of the Art Institute of Chicago</td>
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<tr>
<td>Tulane University</td>
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<tr>
<td>University of Colorado, Denver</td>
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<tr>
<td>University of Florida</td>
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<tr>
<td>University of Georgia</td>
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<tr>
<td>University of Illinois at Urbana</td>
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<tr>
<td>University of Kentucky</td>
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<tr>
<td>University of Maryland</td>
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<tr>
<td>University of Massachusetts</td>
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<tr>
<td>University of Minnesota</td>
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<tr>
<td>University of Notre Dame</td>
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<td>University of Oregon</td>
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<tr>
<td>University of Pennsylvania</td>
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<tr>
<td>University of Southern California</td>
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<tr>
<td>University of Texas at Austin</td>
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<tr>
<td>University of Utah</td>
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<tr>
<td>University of Vermont</td>
</tr>
<tr>
<td>Ursuline College</td>
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</tbody>
</table>
Table 3.2: Nonprofit Management Skills

<table>
<thead>
<tr>
<th>Nonprofit Management Skill</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration</td>
<td></td>
</tr>
<tr>
<td>Advocacy</td>
<td></td>
</tr>
<tr>
<td>Budgeting</td>
<td></td>
</tr>
<tr>
<td>Business (Including Administration, Management Marketing, Finance)</td>
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<tr>
<td>Community Development</td>
<td></td>
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<tr>
<td>Fundraising</td>
<td></td>
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<tr>
<td>Grant Writing</td>
<td></td>
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<tr>
<td>Human Resources</td>
<td></td>
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<tr>
<td>Intergovernmental Relations</td>
<td></td>
</tr>
<tr>
<td>Leadership</td>
<td></td>
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<tr>
<td>Negotiation</td>
<td></td>
</tr>
<tr>
<td>Nonprofit (Including Leadership, Management, Governance)</td>
<td></td>
</tr>
<tr>
<td>Organizational Development</td>
<td></td>
</tr>
<tr>
<td>Revitalization</td>
<td></td>
</tr>
</tbody>
</table>

The analysis revealed that nonprofit management courses are offered in 35 percent of the preservation graduate programs (See Table 3.3). Nine percent of programs require nonprofit management courses to be completed. Eastern Michigan University’s preservation program, which resides within the Geography and Geology department within the College of Arts and Sciences, offers three tracks within the Master of Science degree. The tracks are preservation planning and administration; recordation, documentation, and digital heritage; and interpretation, cultural tourism and museum practice. Depending on the track, required courses that focus more on nonprofit management include “Funding Preservation Projects”, “Introduction to Historic Administrations” and “Community Development and Downtown Revitalization.” Tulane University requires a course in “U.S. Preservation Field Studies and Advocacy” within its Master of Preservation Studies degree. Ursuline College rounds out the group by requiring “Grant

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Writing” within its Master of Arts degree. The analysis shows that only five courses that cover nonprofit management skills were determined to be required in preservation graduate programs.

Table 3.3: Determination of Nonprofit Management Courses Offered in College or University Graduate Programs

<table>
<thead>
<tr>
<th>Determination</th>
<th>College or University</th>
</tr>
</thead>
<tbody>
<tr>
<td>Require Nonprofit Management Courses</td>
<td>Eastern Michigan University</td>
</tr>
<tr>
<td></td>
<td>Tulane University</td>
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<tr>
<td></td>
<td>Ursuline College</td>
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<tr>
<td>Offer Elective Nonprofit Management Courses</td>
<td>Ball State University</td>
</tr>
<tr>
<td></td>
<td>Colorado State University</td>
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<tr>
<td></td>
<td>Georgia State University</td>
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<tr>
<td></td>
<td>Goucher College</td>
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<tr>
<td></td>
<td>Middle Tennessee State University</td>
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<tr>
<td></td>
<td>Roger Williams University</td>
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<tr>
<td></td>
<td>University of Colorado, Denver</td>
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<tr>
<td></td>
<td>University of Maryland</td>
</tr>
<tr>
<td></td>
<td>University of Utah</td>
</tr>
<tr>
<td>Do Not Offer Nonprofit Management Courses</td>
<td>Boston Architectural College</td>
</tr>
<tr>
<td></td>
<td>Boston University</td>
</tr>
<tr>
<td></td>
<td>Clemson University &amp; College of Charleston</td>
</tr>
<tr>
<td></td>
<td>Columbia University</td>
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<tr>
<td></td>
<td>Cornell University</td>
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<td></td>
<td>Pratt Institute</td>
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<td></td>
<td>Savannah College of Art &amp; Design</td>
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<td></td>
<td>School of the Art Institute of Chicago</td>
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<td></td>
<td>University of Georgia</td>
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<td>University of Southern California</td>
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<td></td>
<td>University of Texas at Austin</td>
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<td></td>
<td>University of Vermont</td>
</tr>
<tr>
<td>Undetermined</td>
<td>Plymouth State University</td>
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<tr>
<td></td>
<td>Rutgers University</td>
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<td></td>
<td>University of Florida</td>
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<tr>
<td></td>
<td>University of Illinois at Urbana</td>
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</tbody>
</table>

Twenty-six percent of graduate preservation programs offer courses that teach nonprofit management skills as shown in Table 3.3, but on an elective basis. These programs sometimes allow for elective courses to be taken within different schools, for example a School of Business, with approval of an advisor. Other programs have specific courses that are listed within the curriculum as electives, that could be offered within or outside of the school that houses the preservation program. Some course listings include nonprofit management, organizational development for preservation nonprofits, budgeting and finance in complex organizations, human resources management for organizational leaders, grant writing, and public history administration. As electives, the courses are not required to be taken to achieve a master’s degree in preservation. More electives within academic programs are geared toward NCPE’s specialized components of design, technology, economics, law, planning, and curation. This can be attributed to the needed specialized component standard required of NCPE member institutions. Though this study did not address which electives students chose to take, due to the more widely available specialized component courses, it can be inferred that these courses are taken more often.

The school in which the preservation program resides differentiates what type of courses are offered to meet program requirements. Most preservation programs reside within schools and

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departments of architecture. Figure 3.1 illustrates that 62 percent of preservation graduate programs are within architecture departments followed by 14 percent within colleges or schools of the arts and science. Even though architecture-housed programs would be thought to be more designed-focused, they represented 40 percent of the programs offering nonprofit management courses within their curriculum. Arts and Sciences-housed programs represent 30 percent and those housed within a graduate program department represent 20 percent. Many of the programs that offer courses that teach nonprofit management skills do so by allowing students to take the courses outside of the preservation-housed school or department. Therefore, there is no correlation between where the program is housed and the offering of nonprofit management courses. Some preservation programs allow classes within other schools and departments to count towards program requirements, which allows students to better customize their preservation education.

Figure 3.1: School or Department Preservation Graduate Programs Reside
Preservation graduate programs are designed to prepare students for variety of preservation careers. However, the analysis shows that most preservation graduate programs do not place a priority on offering nonprofit management skill-based classes. Though many preservationists will end up working within nonprofits, it is likely their exposure to nonprofit management skills and competencies will not come from their graduate program. Except for the three graduate programs that require completion of a nonprofit management-focused course, students looking to gain experience prior to professional life will have to actively choose to take available electives or look for opportunities outside of the classroom. Preservation education cannot guarantee its graduates competency when leading nonprofits until NCPE membership standards add nonprofit management as a focus for the field.

The Historic Preservation Executive Directors (HPEDs) surveyed in this study differed in how they gained their preservation skills. Forty-six percent of the respondents stated they received their preservation skills through on-the-job and academic training. Thirty-eight percent gained it on-the-job only and the remaining 15 percent stated academic training as the only place they gained their preservation knowledge. In contrast to gaining nonprofit management knowledge, HPEDs are more likely to gain some of their preservation knowledge through their preservation education. Eighty percent of the respondents wished they had received prior training before taking their positions. Training in nonprofit management and fundraising were the most mentioned skills HPEDs wish they had, followed by budgeting. The main goal of a preservation degree is to teach those skills needed to work within preservation, however there is still a gap for those preservationists who end up working in nonprofits. Preservation education does not prepare students for the nonprofit environment.
Professional Development in Historic Preservation

Preservation education does not encompass just academic programs. Preservation professionals, regardless of their academic or work background, have professional development opportunities to keep up-to-date on preservation happenings and to learn new skills. Conferences, workshops, local training sessions, webinars, and academic classes are the most common ways HPEDs participate in professional development. These trainings are subject to the financial stability of the organization and the ability of the nonprofit to afford them. Professional development can be used to help train people in skills they do not possess but can also help keep professionals up-to-date on new learnings within the field.

The National Trust for Historic Preservation is a national source for preservation professional development. Each year the Trust hosts the “PastForward” conference, which is the premier conference for preservationists. Topics range annually, but usually focus on topics involving the built environment like climate change or cultural landscapes. The “Main Street Now” conference is the nationwide conference for those involved in community revitalization which is also held annually by the Trust. The National Trust also runs the Preservation Leadership Forum which includes the online-networking discussion website, “Forum Connect,” as well as instructor-led trainings known as Preservation Leadership Trainings. The Leadership Trainings are high-level training sessions that focus on topics such as community-making, historic real estate, the legal environment and preservation technology. The last type of training the Trust provides is the Forum Webinar Series. These are free webinars that discuss relevant preservation topics while allowing participants to interact with the experts. Past topics include using social media to tell a story and reinterpreting history at historic sites. Throughout the

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30 Listed professional development opportunities were mentioned by participant HPEDs on the online survey discussed in Chapter Five.
Trust’s training opportunities, there are no clear trainings that address nonprofit management and the art of directing. One webinar addresses the National Trust’s grant opportunities but fails to address applying to grants in general. Preservationists most likely will not find educational opportunities on budgeting, finance, or management of nonprofits, but instead will learn these skills when applied to building projects.31

The National Preservation Institute (NPI) is another national organization whose mission is to provide professional training to those working with cultural heritage. NPI provides seminars in identification planning and evaluation; laws and regulations; cultural and natural resource management; Native American cultural resources; historic property management; and curation, conservation and stewardship. The programs are designed to discuss and guide trainees through the preservation regulatory environment along with teaching new technologies. Preservations skills are developed through their programs, but nonprofit management education is non-existent.

Conference attendance is a key professional development opportunity for preservation professionals. Beyond the National Trust’s preservation conferences, many other conferences are held at the statewide, local, and topic-specific level. These conferences become great places for HPEDs to network and gain business partners in their quest to preserve buildings. Conferences

focus on preservation topics such as working within the regulatory environment, and treatment and interpretation of sites which make them important to preservation skill development.

In preparation of the fiftieth anniversary of the National Historic Preservation Act, a coalition was formed of many national and statewide preservation organizations, charitable groups and private businesses to focus on the future of preservation. One of the deliverables of the coalition is to develop leaders, resulting in the creation of the ARCUS leadership platform in partnership with American Express. ARCUS provides low-cost leadership development training to preservationists to become effective leaders. ARCUS is clear to note it does not focus on technical preservation training such as brick restoration or interpreting the regulatory environment. The platform aims to help educate preservationists on modern leadership theory so that they may gain the skills needed to become great leaders. Accepted preservationists participate in a six-month program where they engaged in short web-based learnings along with a one day in-person session within the time frame. Courses reflect more nonprofit management and leadership competencies as they address certain roles a preservation leader performs. These include planner, orator, entrepreneur, fundraiser, and evaluator.32

The ARCUS program is supported by the National Trust for Historic Preservation, the National Conference of State Historic Preservation Officers and Cultural Heritage Partners. As part of the Preservation50 effort, it exemplifies that leading preservation groups acknowledge a need for organizational and leadership training for preservation professionals. Since preservation degree programs gear themselves towards a more technical approach to education, the people and management skills necessary to direct preservation organizations are not learned in an

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academic setting. Professionals are left to gain these skills on the job or through their own professional development pursuits. While some Knowledge, Skills, Abilities, and Other Characteristics (KSAOCs) such as building relationships can truly be gained while on-the-job, skills like budgeting and human resources lend themselves to a classroom setting. ARCUS is the beginning of the preservation field paying closer attention to the leadership and management skills that HPEDs should possess.

**Preservation Education Analysis Conclusion**

Except for the ARCUS program, preservation education barely addresses the skills necessary to lead a nonprofit organization. NCPE membership standards are scant and do not include nonprofit management as one of the specialized components required of member institutions. A review of preservation graduate program illustrates this as only 35 percent of school offer nonprofit management courses within their curriculum. Fewer school require such courses at nine percent of the survey group. As NCPE does not recognize a nonprofit as a specialized component, the results reflect the standards.

Professional development opportunities in the form of conferences, online forums and preservation-specific workshops also neglect nonprofit management and leadership learning needs. These trainings and conferences tend to focus on topics within preservation such as gentrification and climate change. They also train professionals to be prepared to work within the preservation regulatory environment, understand treatment of buildings, interpretation of buildings and historic property management to name a few topics. How to lead and run an organization are rare topics within these professional learning opportunities. This leaves preservation executive directors to look outside of the preservation field for nonprofit
management training and to rely on work experience to gain competence in nonprofit management and leadership skills.
Chapter Four: Job Analysis

Job Classification Analysis

The Occupational Information Network (O*NET) is an online database hosted by the U.S. Department of Labor, Employment and Training Administration. It is used as a resource during job analysis to get up-to-date information on attributes and requirements for hundreds of jobs and is designed to be used by students and professionals alike. Jobs within the database are clustered under core positions that reflect similar job tasks and needed Knowledge, Skills, Abilities, and Other Characteristics (KSAOCs). The Executive Director falls under the “Chief Executives” occupation, along with Chief Executive Office, Chief Financial Officer, Operations Vice President, and President. As some of these positions lend themselves to be part of the corporate and private sector, it shows how the nonprofit Executive Director shares similar tasks and KSAOCs as their equals in corporations.33

The traits needed to be a successful Chief Executive are rated by importance with a score of 100 being the most important and one being least important. The top five traits listed under Knowledge, Skills and Abilities are listed within Table 4.1 with their importance score. Under the Abilities section, speaking and oral communication is the overarching top ability. Chief Executives are expected to be the figurehead of the organization which many times includes public speaking engagements along with everyday relationship building. Effective communication and speaking combined with the skills of judgment and decision making, complex problem solving, critical thinking, coordination and social perceptiveness also reinforce skills that allow the Chief Executive to be able to think quickly to maintain a positive public

image. The Chief Executive also needs to be skilled at managing different aspects of the operation. The knowledge section of the table shows that being an effective administrator along with a manager of human resources and customer service are top priorities. These skills exemplify the management and operational skills of the Chief Executive. The Chief Executive must also know how to comply with government regulations. Overall, the KSAOCs listed as most important in the job classification show that the Executive Director of any organization must juggle multiple skills to be successful in their position, with communication and management being the most necessary skills.\(^3\)

The educational requirement of the Chief Executive in O*NET states that most of the positions require completion of graduate school, however only 26 percent of respondents are listed having a Master’s degree and 22 percent have a Bachelor’s degree within the classification. This is echoed in the O*NET Job Zone ranking of Five, which is the highest skill requirement zone, requiring “extensive preparation.” Chief Executives are also assumed to have already obtained the required skills, knowledge, and work-related experience for the position. The Specific Vocational Preparation (SVP) is 8.0 and above meaning that over four to ten years or more of relevant training and work experience is required. Job Zone Five occupations rely on advanced and heavy use of communication and organization skills and most commonly involve supervising or coordinating activities to achieve goals. The education and experience notations of post-graduate degree and multi-year experience ensure that a Chief Executive has had enough experiences to be prepared for a multi-tasking, public facing role that once again requires great management and communication skills.\(^4\)

\(^3\) O*NET Sites.
### Table 4.1: Chief Executive Top Five Knowledges, Skills and Abilities in O*NET

<table>
<thead>
<tr>
<th>Knowledge</th>
<th>Description</th>
<th>Score (Out of 100)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration and Management</td>
<td>Knowledge of business and management principles involved in strategic planning, resource allocation, human resources modeling, leadership technique, production methods, and coordination of people and resources.</td>
<td>94</td>
</tr>
<tr>
<td>Personnel and Human Resources</td>
<td>Knowledge of principles and procedures for personnel recruitment, selection, training, compensation and benefits, labor relations and negotiation, and personnel information systems.</td>
<td>78</td>
</tr>
<tr>
<td>Customer and Personal Service</td>
<td>Knowledge of principles and processes for providing customer and personal services. This includes customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.</td>
<td>77</td>
</tr>
<tr>
<td>English Language</td>
<td>Knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar.</td>
<td>77</td>
</tr>
<tr>
<td>Law and Government</td>
<td>Knowledge of laws, legal codes, court procedures, precedents, government regulations, executive orders, agency rules, and the democratic political process.</td>
<td>73</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Skills</th>
<th>Description</th>
<th>Score (Out of 100)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Judgment and Decision Making</td>
<td>Considering the relative costs and benefits of potential actions to choose the most appropriate one.</td>
<td>88</td>
</tr>
<tr>
<td>Complex Problem Solving</td>
<td>Identifying complex problems and reviewing related information to develop and evaluate options and implement solutions.</td>
<td>85</td>
</tr>
<tr>
<td>Critical Thinking</td>
<td>Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.</td>
<td>85</td>
</tr>
<tr>
<td>Speaking</td>
<td>Talking to others to convey information effectively.</td>
<td>85</td>
</tr>
<tr>
<td>Coordination (Tie)</td>
<td>adjusting actions in relation to others' actions.</td>
<td>81</td>
</tr>
<tr>
<td>Management of Personnel Resources (Tie)</td>
<td>Motivating, developing, and directing people as they work, identifying the best people for the job.</td>
<td>81</td>
</tr>
<tr>
<td>Social Perceptiveness (Tie)</td>
<td>Being aware of others' reactions and understanding why they react as they do.</td>
<td>81</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Abilities</th>
<th>Description</th>
<th>Score (Out of 100)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oral Comprehension</td>
<td>The ability to listen to and understand information and ideas presented through spoken words and sentences.</td>
<td>88</td>
</tr>
<tr>
<td>Oral Expression</td>
<td>The ability to communicate information and ideas in speaking so others will understand.</td>
<td>85</td>
</tr>
<tr>
<td>Written Comprehension</td>
<td>The ability to read and understand information and ideas presented in writing.</td>
<td>81</td>
</tr>
<tr>
<td>Deductive Reasoning (Tie)</td>
<td>The ability to apply general rules to specific problems to produce answers that make sense.</td>
<td>78</td>
</tr>
<tr>
<td>Speech Clarity (Tie)</td>
<td>The ability to speak clearly so others can understand you.</td>
<td>78</td>
</tr>
<tr>
<td>Speech Recognition (Tie)</td>
<td>The ability to identify and understand the speech of another person.</td>
<td>78</td>
</tr>
<tr>
<td>Written Expression (Tie)</td>
<td>The ability to communicate information and ideas in writing so others will understand.</td>
<td>78</td>
</tr>
</tbody>
</table>

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30 O*NET Sites, “11-1011.00 - Chief Executives.”
The job classification analysis shows the importance a HPED to have strong management and communication skills while being able to multi-task and be the public face of the organization. Writing skills and speech clarity are rank high within the classification, which helps the HPED spread the organizational message to members, partners, and the community. The ability to make decisions using problem solving, deductive reasoning, and critical thinking skills is also important as it helps the HPED make decisions that are strategic to the organization’s needs. Obtaining post-graduate degrees and having extensive experience are recommend ensuring that the HPED has strong competence in the necessary skills. The HPED is a versatile leader who is skilled in a multitude of skills.

**Job Description Analysis**

Analyzing the existing job descriptions for the HPED gives insight into the KSAOCs required for the position. Twenty-five job descriptions were obtained from the PreserveNet Job website. The job descriptions were divided into categories based on the organization type: local organization, Main Street organization, and statewide/nationwide organizations. A local organization is a nonprofit that focuses on a specific municipality or a location within a municipality but does not include Main Street organizations. Main Street organizations are organizations that use the National Trust for Historic Preservation’s Four Point Approach to downtown revitalization. Statewide and Nationwide Organizations were analyzed within one category due to the nature of their organization to represent multiple communities along with a smaller number of job descriptions for these positions. KSAOCs along with competencies were identified within the job descriptions and organized by category to find the highest mentioned KSAOCs and competencies. Education and experience requirements were also recorded.

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37 The PreserveNet website can be found at http://www.preservenet.cornell.edu/employ/jobs.php. It is a preservation-related job source for professionals. Individual job descriptions are listed in the bibliography.
Local Organizations

Ten local organizations were analyzed with a total of 46 different KSAOCs and competencies listed. Those traits that were listed in 50 percent or more of the job descriptions are shown in Figure 4.1. These traits make up only 39 percent of the total mentioned traits, which emphasizes the differences in job descriptions and needed skills. The local organizations had the most diverse job description in comparison to the two other categories, with some job descriptions being a paragraph in length and others a couple of pages.

![Figure 4.1: Local Organization KSAOCs and Competencies](image)

In the case of local organizations, historic preservation knowledge and management skills are mentioned in all ten job descriptions. Historic preservation mentions varies from knowledge about identifying endangered historic structures and rehabilitation, documentation and creating
reports, and advocating for historic buildings. Organizational management and management of human resources were also listed in all descriptions. Next, the importance of being a successful strategic planner along with effective communication is mentioned in nine out of ten job descriptions. The top mentioned competencies reflect similar findings in the job classification analysis, which point to management and communication skills being of high importance.

Universal agreement on competencies then begins to decline as the job descriptions became more unique from one another. A reason for this could be the difference in the quality of job descriptions. Some descriptions are detailed with specific educational and experience requirements, responsibilities, and qualifications, while some are a mere two paragraphs. The competencies and skills mentioned reflect nonprofit management skills have a strong connection to preservation. Advocacy, building community relations, and partnering with external partners are all competencies that many preservation nonprofits perform daily, and could explain the high occurrence of these skills in the job descriptions. The analysis demonstrates that competencies required of the HPED reflects a mix of nonprofit management KSAOCs and historic preservation knowledge used interchangeably.

**Main Street Organizations**

Main Street organizations were analyzed using ten job descriptions. A total of 42 different KSAOCs and competencies were identified. Those traits that were identified in 50 percent or more of the job descriptions are listed in Figure 4.2. In the case of the Main Streets, 45 percent of the identified traits are mentioned in 50 percent or more of the job descriptions. This contrasts the local organizations, which matched 39 percent for traits found in 50 percent or more of the descriptions. A reason for this could be due the Main Street Program being a franchise of the National Trust for Historic Preservation. The Main Street Program is a standardized approach
created by the National Trust for Historic Preservation to help revitalize historic downtowns. It requires an organization to be created (normally a nonprofit) to administer the Main Street Approach using its Four-Points: Design, Promotion, Economic Vitality and Organization. Due to having a standardized implementation plan, the role of the HPED within these organizations is generally similar and less likely to have varying descriptions like the local organizations. The differences in quality of Main Street job descriptions though are apparent as no competency was found within 100 percent of job descriptions. So, though there are many Main Street Program implementation plans available that detail the executive director role in detail, it shows that the organizations themselves are unique and place certain qualities higher than others when making a job description.

![Main Street Organizations](chart.png)

Figure 4.2: Main Street Organization KSAOCs and Competencies

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Most frequently mentioned skills and competencies for Main Street organizations are management and communication. This is significant as it supports the local organization and job classification findings that management and communication skills are the top qualifications of a HPED. There is a shift, however, with the Main Street HPED compared to the local organization HPED. The Main Street HPED position places a higher importance on community building, development, and the marketing of the organization. It also places a higher importance on knowledge of historic preservation and economic development over budgeting responsibilities and program planning. Volunteer management, mentioned in 70 percent of the Main Street descriptions, also makes its only appearance of most frequently mentioned traits out of the three types of organizations being studied in the job description analysis. This can be attributed to the Main Street Program relying on volunteer labor to perform the organization’s work. The Program also relies on creating local events for the community as well as helping businesses and homeowners rehabilitate and maintain their historic buildings.

The goals of the Main Street Program allow this type of HPED to focus on historic preservation through strong community building and economic development. It is still important though for the Main Street HPED to keep communication and management skills at the forefront of their skill set. Clear and effective communication is necessary for the Main Street HPED to build relationships, gain grants for preservation and recruit volunteers to help make their organization successful. Being able to put on weekend festivals that draws in crowds and new businesses is just as important as rehabilitating a historic storefront to the Main Street HPED. Versatility to manage the responsibility of meeting the Four-Point Approach along with fundraising and maintaining the image of the organization is necessary.
Statewide and Nationwide Organizations

Job descriptions for statewide and nationwide preservation organizations are fewer in comparison to local organizations and Main Street organizations. Statewide and nationwide organizations represent a smaller group of nonprofits that encompass multiple communities or states. Analysis consisted of five organizations that posted job descriptions on PreserveNet within the last five years. Thirty-eight different competences were mentioned within descriptions, with 46 percent of competencies being mentioned in 60 percent or more of job descriptions.

All job descriptions agreed upon seven main competencies and skills needed for the HPED as shown in Figure 4.3. These are management, communication, supervision, advocacy, fundraising, finance, budgeting, and partnering with external organizations. Compared to the local and Main Street organizations, 100 percent of the job descriptions mentioning seven of the same competencies is significant. The increase in agreement of competencies could be due to the highly public nature of being a statewide/nationwide HPED. The HPED of this type of organization needs to have strong social perceptiveness as they are the public face of the organization. He or she is most likely overseeing a large budget in comparison to the other organizations surveyed which means that fundraising and budgeting will be a large part of their responsibility. The statewide and nationwide HPED therefore must maintain many relationships with both donors and external partners. With a larger organization, statewide and nationwide organizations have the capacity to staff more employees to help with responsibilities. This contrasts with local and Main Street organizations whom are more likely to have the HPED performing multiple responsibilities to keep the organization running while also helping meet mission goals.
A statewide and nationwide organization usually is accompanied by a highly skilled board of directors. Board members are very likely to be recognized leaders in the community or within their field. Statewide and nationwide organization are major players within the preservation community and require highly qualified board members to keep the organization running. These board of directors would require the same of the person they chose to head the organization, the executive director. Creating well-written job descriptions that encompasses the total job requirements and necessary competencies is more likely in these organization that have the resources to hire a recruiting company or has a board member skilled in human resources.

The HPED at this level will be facing state and federal governments regularly and the ability to communicate and advocate is necessary. At the same time, organizations that are known for advocating at such a high level also must be properly managed to maintain the image.
of a respected organization. Organizations that see scandal or mishandling will quickly lose their credibility when advocating. Finding an HPED that can manage the day to day management of the organization along with the social image of the nonprofit is in the best interest of the statewide and nationwide nonprofit. Historic preservation was mentioned in only 60 percent of the job descriptions which shows the ability to lead and be the face of a nonprofit organization is vital in statewide and nationwide nonprofit organizations.

**Overall Education and Job Experience in Job Descriptions**

Education requirements were mentioned in 56 percent of all job descriptions. Forty percent require a bachelor’s degree in a relevant field. Fields include nonprofit management, historic preservation, urban planning, small business administration, marketing, economic development, and public administration. Twenty percent of the descriptions require a graduate degree within similar fields while 16 percent of descriptions prefer the candidate to have a graduate degree. Therefore, 64 percent of descriptions did not require a graduate degree. Instead, job experience was required as a requisite of the job.

Work experience is valued more within the job descriptions with 72 percent specifying preferred or required experience. Local organizations range from two to ten years of experience in nonprofit management or business management leadership. Main Street organizations focus on the type of experience required rather than the number of years. Main Street organizations look for experience in commercial district management, urban planning, historic preservation, community development, public or business administration, nonprofit or volunteer management, or Main Streets. For the statewide/nationwide organizations, senior level management experience of five to ten years of leadership experience is required.
The job description analysis shows that proficiency in management and communication is the most important skill requirement of HPEDs. Other important KSAOCs include being able to build relationships within the community and with external partners as well as knowledge of historic preservation. Within Main Street organizations, experience with economic development and rehabilitation is important due to the nature of the National Main Street Program. In the larger statewide and nationwide organizations, advocacy and fundraising experience are required in addition to previously mentioned skills. The ability to run a nonprofit organization through effective communication, management, advocacy, relationship building, budgeting, and fundraising is the major requirement of a HPED. Knowledge of historic preservation is mentioned but sometimes not expanded upon. The job description analysis shows that nonprofit management competence is the more important qualification of the HPED.

Survey and Interview Analysis

A survey of past or present HPEDs was conducted to identify the KSAOCs necessary to manage a preservation nonprofit. A survey allows subjects to participate anonymously and identify the current skills and traits currently use, while also allowing them to look toward the future and identify what skills they need to gain. Surveys within a job analysis reveal the day-to-day tasks of a position and what the subject actually spends their time on. Interviews were also conducted with three past and present HPEDs as another approach to gain information about their educational background and the skills needed within their positions. By collecting this data for this study, it can be determined how HPEDs differ from executive directors of general nonprofit organizations due to their preservation-specialization.

Survey subjects were recruited through the Preservation Leadership Forum’s “Forum Connect”, which is a discussion-based platform within the National Trust for Historic
Preservation website. The forum serves as an “online-networking platform” where professionals who engage in preservation can chat, ask questions, or seek advice from discussion members throughout the country.\(^{39}\) Participants were recruited during late February through mid-April of 2018. A total of thirteen executive directors participated in the survey.\(^{40}\) The online survey questions and interview questions can be found in Appendix A and B respectively.

Participants’ preservation nonprofits were located in eleven different states as shown in Figure 4.4. All states represented had one participant, except for Rhode Island and Massachusetts, which had two participants each. The majority of participants have served as an HPED at one nonprofit, while 17 percent have served at multiple preservation nonprofits. This number increases to 33 percent when looking at HPEDs that have served as an executive director at any nonprofit. The average range of tenure as an HPED is 8.4 years, with the lowest tenure starting at one year, and the longest tenure at eighteen years. Almost all participants lead small nonprofits with six full-time staff members or less. Figure 4.5 shows the distribution of nonprofit size from zero to twenty-six full-time staff. Preservation nonprofits with a larger focus such as national or statewide are much fewer in number than those with a local focus.

\(^{39}\) “Forum Connect | #PreservationForum.”

\(^{40}\) The survey was anonymous, and subjects were allowed to skip questions, therefore quantity of answers per question varies.
Figure 4.4: Location of Participants within the United States
Figure 4.5: Size of Participant Preservation Nonprofit Organization

*Academic Background Results*

Most of the participants held an academic degree. Of the thirteen respondents, 92 percent hold academic degrees. Sixty-seven percent of HPEDs with academic degrees have both undergraduate and graduate degrees. An additional 17 percent have only an undergraduate degree, with an additional 17 percent holding only a graduate degree. Historic preservation represents 30 percent of undergraduate majors and is representative of the more professionalized degree programs, along with one response of electrical engineering. The remaining 60 percent of respondents come from liberal arts backgrounds in English, art history, history, painting, and anthropology. Historic preservation is the most frequently held graduate degree at 33 percent of the nine participants. ED3 was representative of this category, having received a bachelor of arts in history and a master of science in preservation.41 She served as a historic preservation specialist for three years before becoming an HPED. Type of graduate degree differs among the

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41 Interviews with preservation executive directors were anonymous. They will be identified as “ED1,” “ED2,” and “ED3” throughout the paper. ED3. 2018. Interview by author. Kingston (By Phone). April 6.
rest of the respondents, with architectural history, public history, history, anthropology, philosophy and history and social study of science of technology each representing a different respondent. One respondent has a law degree. Survey results demonstrate that the academic backgrounds of HPEDs are highly varied.

When discussing their academic programs, most applicants felt that their academic education prepared them to work within the field of historic preservation, but in different ways. Thirty-six percent mentioned that their degrees helped them develop critical thinking, problem solving, research, writing and creativity skills that are vital to their positions today. A separate 36 percent stated that they learned how to work with the built environment and communities through their academic degree.

The management skills needed for the position were developed on-the-job however. These include soft skills needed to be able to build relationships within the community and be the public face of an organization. In regards to how their academic programs prepared them to work within nonprofit management, 64 percent of respondents felt their academic programs did not cover management or the daily functions of running a business. The respondents mostly gained these skills through on-the-job experiences and workshops. ED2 was representative of this category, as she began her career with a bachelor of arts in English literature but worked in the financial and banking industry. She took graduate courses in business before she transitioned to President and Acting Executive Director of a small preservation nonprofit.\footnote{ED2. 2018. Interview by author. Kingston (By Phone). March 7.} Eighteen percent of respondents stated they were allowed to seek out courses in grant management or similar courses within their academic program individually. Another 18 percent of respondents stated
that although they felt most skills needed to run a nonprofit can be gained on the job, they would like to see preservation programs better prepare students for fundraising and development.

Another eighteen percent of the respondents felt their education prepared them greatly to be a HPED, even with their liberal arts backgrounds. The critical thinking and problem-solving skills they acquired in college were enough to prepare them for the role. Outside of this sample are the HPEDs with no academic background. ED1 did not have a college degree but gained experience in public affairs and communication prior to becoming a HPED. It was her experiences providing consultant services to nonprofits and later working with a chamber of commerce that prepared her for the position of HPED.43

Nonprofit Management Knowledge, Skills, Abilities and Other Characteristics (KSAOCs)

Analysis

When asked to identify what nonprofit management KSAOCs they used on a regular basis, respondents were almost unanimous in choosing all listed KSAOCs as demonstrated in Figure 4.6. HPEDs were asked to rank their chosen supervisory responsibilities, with one being the more important KSAOCs through the least important KSAOCs. Ranking the KSAOCs forces the HPED to identify what skills and traits they use the most within their position. Figure 4.7 shows how directing was the overall highest ranked skill when leading a nonprofit organization. Directing includes the ability to guide the staff and oversee the performance of the organization to achieve its mission.44 This aspect of the HPEDs role was also described by some respondents as needing to have passion and the ability to lead others. Developing the organization through fundraising and interpersonal relationships was listed as second most important, followed by

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budgeting as being the top three KSAOCs. The data shows that the HPED priorities are to lead, build relationships and maintain the financial stability of the organization. The data also shows that disciplining and terminating are prioritized lower compared to the other KSAOCs. Smaller organizations and staff numbers could explain a lesser need to exhibit these skills on a daily basis.

Figure 4.6: Nonprofit Management KSAOCs by Choice Count
The majority of HPEDs agreed that their nonprofit management skills were gained through on-the-job training with a response rate of 80 percent. The remaining 20 percent felt that both their academic and on-the-job experience prepared them for their positions. None of the respondents stated that their academic education alone had prepared them for their position. With the respondents coming from mostly preservation and liberal arts backgrounds, the data shows
that nonprofit management is not covered within the academic training in the disciplines. Therefore, a preservationist does not have the skills to effectively operate a nonprofit on their education alone. Since preservationists very often end up working in nonprofits, this is a failure in preservation education standards.

Preservation Knowledge, Skills, Abilities and Other Characteristics (KSAOCs) Analysis

To identify the top preservation skills needed for the HPED, respondents were asked to list their top five preservation competencies. The data reveals three most needed preservation competencies as illustrated in Figure 4.8. The most important is knowledge of preservation rules, regulations, and standards. An organization’s ability to work and understand the legal strengths and limitations of historic preservation is important for their advocacy and education efforts. The next necessary competency is the ability to understand local histories and the treatment of the buildings and landscape within. The HPED must understand the existing character and culture of the specific place they are preserving in order to make the best choices for the buildings within. Being able to research and document these properties helps the HPED become educated on what the best choices are and comes in as the third most necessary competency. HPEDs whom did not already possess these skills discussed seeking training through workshops and colleagues. Preservation conferences such as the National Trust for Historic Preservation conference along with locally-based seminars and conferences were helpful to the HPEDs with less preservation expertise. Building relationships with preservation experts was also vital to the HPED who was new to preservation.
Role Analysis

Using the ARCUS preservation courses as guidance, respondents identified their top ten roles they perform and then ranked them from most important to least important (Figure 4.9). These included a mix of positions geared towards nonprofit management and preservation. Respondents unanimously agreed that serving as an advocate was a role they played within their position. It is followed by community engagement, and fundraising. Advocate and community engagement rank among the most important used skills, however fundraising appears in the middle of the importance rank. For the HPED, the ability to engage others and the community in order to educate the public and achieve their mission is more important than the relationship building that goes into fundraising. Being a team builder, visionary, and planner come in toward the mid-high range of importance. These KSAOCs reflect nonprofit management KSAOCs identified as needed for any executive director. The HPED must be able to lead a team while visioning the future of the organization. Many times they achieve this through strategic planning.
The ability to be analytical and understand preservation challenges also comes as a mid-high role performed. Volunteer coordinator and Native American partner were not chosen as one of the top ten roles played. Though it is possible that the HPEDs surveyed do use volunteer labor, nonprofits historically have relied upon volunteers to achieve their mission goals. It is more likely that volunteer coordination and Native American partnering fell to the bottom of the role list in comparison to the other roles listed.

<table>
<thead>
<tr>
<th>Role</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Engagement</td>
<td>2.75</td>
</tr>
<tr>
<td>Advocate</td>
<td>3.77</td>
</tr>
<tr>
<td>Team Builder</td>
<td>4.25</td>
</tr>
<tr>
<td>Visionary</td>
<td>4.3</td>
</tr>
<tr>
<td>Planner</td>
<td>4.4</td>
</tr>
<tr>
<td>Historian</td>
<td>4.43</td>
</tr>
<tr>
<td>Fundraiser</td>
<td>5.55</td>
</tr>
<tr>
<td>Entrepreneur</td>
<td>6</td>
</tr>
<tr>
<td>Budgeter</td>
<td>6.11</td>
</tr>
<tr>
<td>Orator</td>
<td>6.5</td>
</tr>
<tr>
<td>Grassroots</td>
<td>6.57</td>
</tr>
<tr>
<td>Evaluator</td>
<td>7</td>
</tr>
<tr>
<td>Servant</td>
<td>7</td>
</tr>
<tr>
<td>Office Manager</td>
<td>7</td>
</tr>
<tr>
<td>Writer</td>
<td>7.33</td>
</tr>
<tr>
<td>Risk Taker</td>
<td>8</td>
</tr>
<tr>
<td>Risk Mitigator</td>
<td>9</td>
</tr>
<tr>
<td>Human Resources</td>
<td>10</td>
</tr>
</tbody>
</table>

Figure 4.9: HPED Roles Ranked from Most Important (1) to Least Important (10)
Roles listed as least played include risk taker, risk mitigator and human resources. In contrast to the roles that deal more with leading and relationship building, human resources is a more administrative role that HPEDs must have knowledge in but is not as important as being able to lead and direct the organization. When running a nonprofit, decisions that could be seen as risky could be damaging to the organization and hard to recover from. At the same time, a HPED normally will not make any risk adverse decision without approval from the board of directors. The data shows that preservation nonprofits place education and building relationships within the community above choosing to take risks or placing themselves in negative situations. Due to preservation becoming a widely recognized professional field, HPEDs do not have to place their organizations in risky situations as they may have done in the past and are able to maintain the stable successful nonprofits.

**Job Analysis Conclusion**

The job analysis reveals key insights into the journey to becoming a preservation executive director. Historic Preservation Executive Directors (HPEDs) are likely to have an academic degree. Their academic education, regardless of major, gives them experience with critical thinking, problem-solving, creative thinking, research and writing which are crucial to being successful in their roles. HPEDs are likely to gain preservation skills through academic training and on-the-job experience. In addition to research and writing skills previously mentioned, the ability to understand the built environment of a specific location along with knowledge of rules and regulations of preservation are the most important preservation skills an HPED uses. The HPED must also be an established leader, directing the organization and staff towards meeting its mission goals. They build relationships in the community to help fundraise and make partnerships while maintaining the financial stability of the organization. These
nonprofit management skills are more likely to be gained through on-the-job training and post-professional workshops rather than in an academic program.

A preservation executive director must be versatile and flexible, with an ability to perform multiple roles at once. They engage the community, advocate, build teams, plan and envision for the organization’s future. Becoming proficient in all of these roles before taking the position is difficult and more than half of the HPEDs surveyed wished that their academic programs covered some nonprofit management competencies. Since preservation educational opportunities, both academic and professional, focus more on the built environment with the exception of ARCUS, the HPED has to rely on gaining on-the-job experience to prepare for the role. Making preservation education friendlier to nonprofit management and leadership development could help educate professionals to become executive directors earlier in their careers.
Chapter Five: Recommendations

The gap in preservation education to prepare professionals for leadership roles in nonprofit organizations needs to be bridged. Historic preservation executive directors (HPEDs) and preservation nonprofit professionals both require a skill set that is a mix of nonprofit management and preservation skills. They need to know how to lead and direct an organization, maintain finances, and develop external partnerships while being educated in the built environment, having ability to research and write, and acquiring strong communication skills. Addressing this gap should be approached in three ways: changing the National Council of Preservation (NCPE) membership standards, creating a consortium of nonprofit professionals interested in preservation nonprofit management leadership, and continuing to expand the ARCUS platform.

The NCPE membership standards should be modified to include a nonprofit management specialized component. Due to the interdisciplinary nature of the preservation field, making the standards more specific could cause backlash from members institutions who are set in their current approach to preservation. Reaching consensus on how to make the standards more specific would likely be a lengthy process. Instead, adding nonprofit management as a specialized component within the NCPE standards would give institutions the approval to develop new program requirements inclusive of this part of the field. Academic institutions that already allow students to take nonprofit management and leadership courses should continue to offer such courses. Creating a nonprofit management track or certificate program within a preservation program could bring in students interested in that part of the field to a specific school. It would also allow students to begin to gain knowledge they can use in the professional
career while currently students are unlikely to learn nonprofit management knowledge in preservation academic programs.

Nonprofit management courses that should be offered in preservation academic programs could cover a variety of topics. Whether offered within the preservation program school or within another school in the university, having the courses available allows students to cater their preservation education to their own interests. Course topics should include financial management and budgeting, fundraising, strategic planning, and community and intergovernmental relations. A single preservation nonprofit management course could cover many skills within one semester. Though this class could not cover every topic in depth, students could at least have a general understanding of the mechanics of a nonprofit organization. By making these courses more available and calling nonprofit management out as a specialized component, preservation academic programs are more likely to include these courses within their program requirements.

Next, a consortium of preservation nonprofit professionals interested in career development should be created. The consortium would be made of executive directors and nonprofit professionals interested in expanding their HPED knowledge while creating a pool of potential executive directors. An example of a similar type of group is TSNE MissionWorks. TSNE MissionWorks is an organization that, “…provides information and services to build the knowledge, power, and effectiveness of individuals, organizations and groups that engage people in community and public life.”45 The organization provides nonprofit management training services as well as interim executive director placement for organizations in between executive directors.46 Creating a similar consortium, but for preservation professionals, could help educate

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and maintain a pool of highly qualified people to become the next preservation executive directors.

Lastly, ARCUS must continue to educate preservation professionals in leadership and management skills. The program being offered at the national level, to anyone within the United States, helps show preservationists that acquiring these skills are important for career development. With sessions happening twice a year, an effort should be made to offer more training through this platform. ARCUS may also be a good place to begin the preservation nonprofit consortium, as it is a central platform for this type of professional. Continuing to offer leadership and management training to preservation professionals in this platform is vital to continuing the effort to increase this type of learning in preservation academic programs. Increasing awareness of the gap between preservation education and the nonprofit management preservation professional could lead to better training opportunities in the future.

Conclusion

Preservation executive directors have the important task of keeping their organizations running and successful. They are leaders within the community who give life to preservation while representing their organizational mission. They help create the vision of the organization and lead its staff and members in achieving mission goals. Strong communication skills and management ability allow the preservation executive director to be flexible and perform multiple roles as the leader of the organization. An understanding of nonprofit management and preservation skills means the preservation executive director is versatile and able to see the future while creating the strategic plan for the organization.

In the present state of preservation education, these leaders gain preservation skills during their academic programs and professional development opportunities while having to seek
nonprofit management on-the-job experience to become proficient in those respective skills. This study illustrates that there is a gap between the learning outcomes of preservation graduate programs and the skills needed to lead preservation nonprofits. The National Council for Preservation Education (NCPE) gives priority to the specialized components of a program that focus on design, technology, economics, law, planning, and curation. Nonprofit management as a specialized component does not exist.

Preservation academic programs as well as professional development opportunities need to begin offering nonprofit management and leadership training to help develop the preservation leaders of the future. Creating the programs where future talent can be cultivated will give professionals incentive to stay in their positions longer, rather than having to jump from organization to organization to gain new skills. With the focus of preservation educational programs on teaching preservation technique, research skills, and the regulatory environment, preservation nonprofit professionals need a resource that will approach preservation with a nonprofit management lens.

Historic preservation executive directors have become successful in their positions using a mix of education and experience to gain their knowledge and skills. Because they are the head of organizations that perform major preservation work in the community, they will always need to have years of experience to meet the expert qualifications of taking such a position. However, if preservation education changes to give nonprofit management a greater position within preservation programs, these executive directors can be better prepared to take nonprofit management positions and begin flourishing early within their careers. Gaining the skills and competencies of both preservation and nonprofit management makes the preservation executive
director a successful leader able to represent their organization as well as bring preservation values to the communities he or she serves.
Works Cited


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Appendix A: Online Survey Questionnaire

Becoming the Preservation Executive Director

Start of Block: Introduction Questions

Q1.1 Becoming the Preservation Executive Director

Online Survey and Questionnaire Informed Consent Information[1]

You are being invited to participate in a research study titled “Becoming the Preservation Executive Director: A Journey through the Educational and Professional Development of Preservation Nonprofit Leaders.” This study is being done by Allison Bacon from Roger Williams University. You were asked to participate in this study because you have current or past experience as a preservation nonprofit executive director. Preservation nonprofit is defined as a nonprofit organization that engages in preservation activities or preservation stewardship.

The purpose of this research study is to more thoroughly describe how preservation executive directors gain the knowledge, skills, and competencies to strategically guide their nonprofit organizations. If you agree to take part in this study, you will be asked to complete an online survey/questionnaire. This survey/questionnaire will ask questions similar to those used in the human resource method of job analysis. Questions will ask you about your position as executive director and the tasks you perform, your educational and professional background, and about how you lead your organization. It will take you approximately 30 minutes to 1 hour to complete depending on how detailed you answer. You may leave and continue the survey at another time, however the survey will be discontinued on April 13, 2018.

You may not directly benefit from this research; however, we hope that your participation in the study may help give insight to how preservation professionals gain the knowledge and skills needed to run nonprofit organizations.

We believe there are no known risks associated with this research study; however, as with any online related activity the risk of a breach of confidentiality is always possible. To the best of our ability your answers in this study will remain confidential. We will minimize any risks by saving all data to an encrypted file while not asking you to identify yourself or your organization. All data will be aggregated for final analysis. Data will be kept in an offline encrypted file upon completion of the study.

Your participation in this study is completely voluntary and you can withdraw at any time. You are free to skip any question that you choose however the first two questions qualify you for the study.

If you have questions about this project or if you have a research-related problem, you may contact the researcher Allison Bacon at (401) 965-1098 or research supervisor Professor Elaine
Stiles at (401) 254-5338. If you have any questions concerning your rights as a research subject, you may contact Roger Williams University Human Subjects Review Board.

By clicking “I agree” below you are indicating that you are at least 18 years old, have read and understood this consent form and agree to participate in this research study. Please print a copy of this page for your records.


☐ I Agree (1)

☐ I DO NOT Agree (2)

Q1.2 Are you a past or current Executive Director of a Preservation Nonprofit*?

*Preservation nonprofit is defined as a nonprofit organization that engages in preservation activities (advocating, rehabilitation, and other preservation-related activities) or preservation stewardship.

☐ Yes (1)

☐ No (2)

Q1.3 In what state(s) have you served as a preservation Executive Director?

(Leave blank if you would like to skip this, or other questions.)

☐ US State (1)  ________________________________________________
Q1.4 How many years have you served as an Executive Director in a Preservation Nonprofit in total?

☐ # of Years (1) ________________________________

Q1.5 How many years have you served as an Preservation Executive Director in your current organization?

☐ # of Years (1) ________________________________

Q1.6 How many years have you served as a Executive Director in general? (Preservation and non-preservation organizations)

☐ # of Years (1) ________________________________

Q1.7 What was the title of you last position prior to becoming a Preservation Executive Director?

________________________________________________________________

Q1.8 How many Full Time staff members does your current organization employ? If you are not currently an executive director, how many Full Time staff members did your last organization employ?

☐ # of FT Staff (1) ________________________________

Q46 How many Part-Time staff members does your current organization employ? If you are not currently an executive director, how many Part-Time staff members did your last organization employ?

☐ # of PT Staff (1) ________________________________
Q1.9 In 1 to 3 sentences, describe the general purpose of your position.

________________________________________________________________
________________________________________________________________

End of Block: Introduction Questions

Start of Block: Academic Background

Q2.1 Do you have an academic degree?

☐ Yes (1)

☐ No (2)

Skip To: End of Block If Do you have an academic degree? = No

Q2.2 Which academic degrees do you hold? (Click all that apply)

☐ Undergraduate (1)

☐ Graduate (2)

☐ Post Doctorate (3)

☐ Other (4)
Q2.3 What subjects did you major in?

- Undergraduate (1) ________________________________________________
- Graduate (2) ________________________________________________
- Post Doctorate (3) ________________________________________________
- Other (4) ________________________________________________

Q2.4 What college or university did you attend?

- Undergraduate (1) ________________________________________________
- Graduate (2) ________________________________________________
- Post Doctorate (3) ________________________________________________
- Other (4) ________________________________________________

Q2.5 Do you feel your academic background prepared you for the field of Historic Preservation?

- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree

Q2.6 Please explain your answer to the previous question.

________________________________________________________________________
Q2.7 Do you feel your academic education prepared you for the field of nonprofit management?

<table>
<thead>
<tr>
<th>Strongly agree</th>
<th>Somewhat agree</th>
<th>Neither agree nor disagree</th>
<th>Somewhat disagree</th>
<th>Strongly disagree</th>
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<tbody>
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</tr>
</tbody>
</table>

Q2.8 Please explain your answer to the previous question.

________________________________________________________________
________________________________________________________________

Q2.9 Do you feel your academic education prepared you for the role of Executive Director?

<table>
<thead>
<tr>
<th>Strongly agree</th>
<th>Somewhat agree</th>
<th>Neither agree nor disagree</th>
<th>Somewhat disagree</th>
<th>Strongly disagree</th>
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</tr>
</tbody>
</table>

End of Block: Academic Background

Start of Block: Knowledge, Skills and Competencies
Q3.1 Please check those activities that are part of your supervisory responsibilities:

- [ ] Hiring (1)
- [ ] Promoting (2)
- [ ] Compensating (3)
- [ ] Training (4)
- [ ] Budgeting (5)
- [ ] Disciplining (6)
- [ ] Scheduling (7)
- [ ] Directing (8)
- [ ] Terminating (9)
- [ ] Developing (10)
- [ ] Measuring Performance (11)

Carry Forward Selected Choices from “Please check those activities that are part of your supervisory responsibilities: ”

Q3.2 Please rank the chosen supervisory responsibilities in order of Most Important (1) to Least Important.
Click and drag choices.

- Hiring (1)
- Promoting (2)
- Compensating (3)
- Training (4)
- Budgeting (5)
- Disciplining (6)
- Scheduling (7)
- Directing (8)
- Terminating (9)
- Developing (10)
- Measuring Performance (11)

Q3.3 Are there any other supervisory responsibilities you would like to add?

________________________________________________________________________________________

________________________________________________________________________________________
Q3.4 As Executive Director, What are the top ten roles you play in your position?

- Orator (1)
- Entrepreneur (2)
- Advocate (3)
- Historian (4)
- Grassroots (5)
- Planner (6)
- Fundraiser (7)
- Risk Taker (8)
- Evaluator (9)
- Team Builder (10)
- Writer (11)
- Servant (12)
- Visionary (13)
- Community Engagement (14)
- Budgeter (15)
- Risk Mitigator (16)
- Volunteer Coordinator (17)
- Native American Partner (18)
- Office Manager (19)
Q3.5 Please rank your choices from Most Important role (1) through Less Important (10).

Click and drag choices.

- Orator (1)
- Entrepreneur (2)
- Advocate (3)
- Historian (4)
- Grassroots (5)
- Planner (6)
- Fundraiser (7)
- Risk Taker (8)
- Evaluator (9)
- Team Builder (10)
- Writer (11)
- Servant (12)
- Visionary (13)
- Community Engagement (14)
- Budgeter (15)
- Risk Mitigator (16)
- Volunteer Coordinator (17)
- Native American Partner (18)
- Office Manager (19)
- Human Resources (20)

Q3.6 What is the most necessary competency that an executive director must possess?

______________________________________________________________________________

______________________________________________________________________________
Q3.7 Do you consider this a preservation competency or nonprofit management competency?

- Preservation Competency (1)
- Nonprofit Management Competency (2)
- Both Fields (3)
- Other (4) ________________________________________________

Q3.8 Please list the top five PRESERVATION knowledge, skills, abilities and competencies needed for your role as Executive Director.

1- Most Important (1) ________________________________________________
2 (2) ________________________________________________
3 (3) ________________________________________________
4 (4) ________________________________________________
5- Less Important (5) ________________________________________________

Q3.9 Did you gain these preservation skills through academic education or on the job training? Choose the response where you best learned these skills.

- Academic Training (1)
- On the Job Training (2)
- Both (3)
- Neither (4)
Q3.10 Please list the top five NONPROFIT MANAGEMENT knowledge, skills, abilities and competencies needed for your role as Executive Director.

- 1- Most Important (1) ________________________________
- 2 (2) ________________________________
- 3 (3) ________________________________
- 4 (4) ________________________________
- 5- Less Important (5) ________________________________

Q3.11 Did you gain these nonprofit management skills through academic education or on the job training? Choose the response where you best learned these skills.

- Academic Training (1)
- On the Job Training (2)
- Both (3)
- Neither (4)

Q3.12 What training (professional or academic) has best prepared you for being an Executive Director?

________________________________________________________________
________________________________________________________________
Q3.13 Is there any training you wish you would have received prior to becoming an Executive Director?

- Yes (1)
- No (2)

Skip To: End of Block If Is there any training you wish you would have received prior to becoming an Executive Director? = No

Q3.14 Explain your answer.

________________________________________________________________
________________________________________________________________

Q3.15 How do you feel that training(s) should be offered in the future?

- Academic Degree Program (1)
- Professional or Academic Conferences (2)
- On the Job Training (3)
- Web-Based Learning (Free or Paid) (4)
- Professional Training Offered Outside of Conferences (5)

End of Block: Knowledge, Skills and Competencies

Start of Block: Organizational Management

Q4.1 How do you measure success in your organization?

________________________________________________________________
________________________________________________________________
Q4.2 What are the top 3 competencies used to measure success in your organization?

- 1- Most Important (1) ________________________________
- 2 (2) ________________________________
- 3- Less Important (3) ________________________________

Q4.3 Does your organization foster professional development from within?

- Yes (1)
- No (2)

Q4.4 What does professional development look like in your organization?

__________________________________________
__________________________________________

Q4.5 Do you feel like a preservation background is needed to be a successful executive director?

- Yes (1)
- No (2)

Q4.6 Do you feel like a nonprofit management background is needed to be a successful executive director?

- Yes (1)
- No (2)

End of Block: Organizational Management
Q5.1 The following section will ask you to describe your responsibilities, or tasks, that are performed within your position. Please be a specific and detailed as possible.

Q5.2 Please list your daily tasks.

________________________________________________________________
________________________________________________________________

Q5.3 Please list your periodic tasks, or tasks that are performed annually, quarterly, weekly and so on.

________________________________________________________________
________________________________________________________________

Q5.4 Please list any tasks you perform, but are unnecessary for your position or could better be a task for another position in your organization.

________________________________________________________________
________________________________________________________________

Q5.5 Please list any skills required in the performance of your position. (For example, amount of accuracy, alertness, precision in working with described tools, methods, systems, etc.)

________________________________________________________________
________________________________________________________________

Q5.6 If your position requires you to use any equipment and/or programs, please list the equipment.

________________________________________________________________
________________________________________________________________
Q47 Survey will end when you click next!

Last chance to pan back to past responses.

End of Block: Task Inventory
Appendix B: Interview Questions

- How prepared did you feel for the executive director position?
- What educational and professional background do you have?
- What do you feel the most important parts of the position are?
- How do you foster professional development within your organization?
- Do you wish you had received any prior training before taking the executive director position?
Appendix C: Online Consent Form

Becoming the Preservation Executive Director Online Survey and Questionnaire
Informed Consent Information[1]

You are being invited to participate in a research study titled “Becoming the Preservation Executive Director: A Journey through the Educational and Professional Development of Preservation Nonprofit Leaders.” This study is being done by Allison Bacon from Roger Williams University. You were asked to participate in this study because you have current or past experience as a preservation nonprofit executive director. Preservation nonprofit is defined as a nonprofit organization that engages in preservation activities or preservation stewardship.

The purpose of this research study is to more thoroughly describe how preservation executive directors gain the knowledge, skills, and competencies to strategically guide their nonprofit organizations. If you agree to take part in this study, you will be asked to complete an online survey/questionnaire. This survey/questionnaire will ask questions similar to those used in the human resource method of job analysis. Questions will ask you about your position as executive director and the tasks you perform, your educational and professional background, and about how you lead your organization. It will take you approximately 30 minutes to 1 hour to complete depending on how detailed you answer. You may leave and continue the survey at another time, however the survey will be discontinued on April 13, 2018.

You may not directly benefit from this research; however, we hope that your participation in the study may help give insight to how preservation professionals gain the knowledge and skills needed to run nonprofit organizations.

We believe there are no known risks associated with this research study; however, as with any online related activity the risk of a breach of confidentiality is always possible. To the best of our ability your answers in this study will remain confidential. We will minimize any risks by saving all data to an encrypted file while not asking you to identify yourself or your organization. All data will be aggregated for final analysis. Data will be kept in an offline encrypted file upon completion of the study.

Your participation in this study is completely voluntary and you can withdraw at any time. You are free to skip any question that you choose however the first two questions qualify you for the study.

If you have questions about this project or if you have a research-related problem, you may contact the researcher Allison Bacon at (401) 965-1098 or research supervisor Professor Elaine Stiles at (401) 254-5338. If you have any questions concerning your rights as a research subject, you may contact Roger Williams University Human Subjects Review Board.

By clicking “I agree” below you are indicating that you are at least 18 years old, have read and understood this consent form and agree to participate in this research study. Please print a copy of this page for your records.

○ I Agree (1)

○ I DO NOT Agree (2)
Appendix D: Interview Consent Form

Interview Informed Consent Form

Information and Purpose: The interview for which you are being asked to participate in, is part of a research study that is focused on more thoroughly describing how preservation executive directors gain the knowledge, skills, and competencies to strategically guide their nonprofit organizations. The researcher is also interested in how preservation education and training prepare professionals for the executive director position. The purpose of this study is to address the gap in preservation education in regard to nonprofit management.

Your Participation: Your participation in this study will consist of an interview lasting approximately one hour. You will be asked a series of questions about your education and career development as well as your time as an executive director. You are not required to answer the questions. You may pass on any question that makes you feel uncomfortable. At any time you may notify the researcher that you would like to stop the interview and your participation in the study. There is no penalty for discontinuing participation.

Benefits and Risks: The benefit of your participation is to contribute information to help understand how preservation professionals prepare for the executive director role. This information will be analysis against preservation education and training resources to analyze if there is a gap in preparing preservation professionals for nonprofit management positions. There are no risks associated with participating in the study.

Confidentiality: The interview will be recorded, however, your name will not be recorded and you will be identified as ED1, ED2… Upon completion of data aggregation, the recorded audio will be destroyed. Though direct quotes from you may be used in the paper, your name and other identifying information will be kept anonymous. All of your information and interview responses will be kept confidential. The researcher will not share your individual responses with anyone other than the research supervisor. If you chose to end participation in the study, your recorded interview will be destroyed, and information collected not used in the study at no penalty to you. If you would like to be identified in the study or have certain responses identified as your own, you may consent below.

If you have any questions or concerns, please contact the researcher Allison Bacon (401) 965-1098 or research supervisor Professor Elaine Stiles at (401) 254-5338

By signing below I acknowledge that I have read and understand the above information. I am aware that I can discontinue my participation in the study at any time.

Signature ___________________________ Date __________________

By signing below, I would like to be identified in the study.

Signature ___________________________ Date __________________
Appendix E: Preservation Leadership Forum Communications

Calling Preservation Nonprofit Executive Directors!

Allison Bacon

02-21-2018 14:06

Forum Connect

My name is Allison and I am currently a Master's student in Historic Preservation at Roger Williams University in Rhode Island working on my master's thesis. The working title is "Becoming the Preservation Executive Director: A Journey through the Educational and Professional Development of Preservation Nonprofit Leaders."

I am looking for Executive Directors of preservation nonprofits (preservation nonprofit is identified as a nonprofit organization that engages in preservation activities and/or preservation stewardship) to find out more about the knowledge, skills, and competencies needed to strategically guide preservation nonprofit organizations. I am also interested in learning about the educational and professional development of individuals before they become Preservation Executive Directors.

Current or past Executive Directors of Preservation Nonprofits may access an online survey at: http://rwu.co1.qualtrics.com/jfe/form/SV_2hJBPB7Ql9LiL6R to participate and it is estimated to take 30 minutes to 1 hour to complete, depending on the level of detail given.

I am also looking for current or past Executive Directors to interview, along with Board Members who assist in hiring Preservation Nonprofit Executive Directors.

Please respond to this post or contact me at abacon072@g.rwu.edu for more information, if you have any questions or would like to participate in an interview. The latest the survey will be open is April 7, 2018 and I'm looking to schedule interviews for the during March.

Thank you for taking the time to consider this study!
RE: Calling Preservation Nonprofit Executive Directors!

04-06-2018 13:56
Forum Connect
My survey is closing soon, but I would love to have a few more participants!

Visit Becoming the Preservation Executive Director | Qualtrics Survey Solutions if you are a past or present Preservation Nonprofit Executive Director to take the survey. I have extended the survey to April 13.

Thank you to everyone who has already participated! I very much appreciate you taking the time out of your busy schedules to assist me with my study.

If you have any questions, please email me at abacon072@g.rwu.edu.

Many Thanks!
Appendix F: Sample Email Communications

Subject: Preservation ED Thesis Research

Hello!

My name is Allison Bacon and I am a student at Roger Williams University studying Historic Preservation. I am working on my thesis which is titled, “Becoming the Preservation Executive Director: A Journey through the Educational and Professional Development of Preservation Nonprofit Leaders.” I am looking for Preservation Nonprofit Executive Directors to fill out my survey as part of my research and would welcome having you as a participant. The link and survey will maintain your identity as anonymous and a full consent form is included at the beginning of the survey. The survey should take 30 min-1 hour to complete, depending on how detailed you are. The link to the study is http://rwu.co1.qualtrics.com/jfe/form/SV_2hJBPB7QI9LiL6R

I hope you will be able to participate in this study if you have time. Please let me know if you have questions. Thank you,
Appendix G: Human Subject Review Board Approval

ROGER WILLIAMS UNIVERSITY
HUMAN SUBJECTS REVIEW BOARD

COVER SHEET FOR RESEARCH PROJECT PROPOSALS

Primary Investigator/Faculty Advisor: Elaine B. Stiles
Date of Submission: 1/15/2018
School/Department: Art, Architecture & Historic Preservation/Historic Preservation
Names of Additional Researchers: Allison G. Bacon

Title of Research Project: Securing the Preservation Education Director: A Journey through the Educational and Professional Development of Preservation Nonprofit Leaders
Grant Funding Supporting this Research: None

[Check one] Academic level for this project:

○ Faculty/Administration ○ Graduate ○ Undergraduate

[Check one] Review sought by principal investigator: Refer to the HSRB handbook guidelines. Note that the HSRB may change the review type.

○ EXEMPT ○ EXPEDITED ○ FULL

Researcher Code of Ethics: I declare that I have read the Roger Williams University Statement of Researchers’ Ethical Principles for the Protection of Human Subjects of Research and am familiar with my obligations thereunder. Furthermore, I agree to abide by that Statement of Ethical Principles adopted by Roger Williams University as part of the Human Subjects Review Board policy.

Elaine B. Stiles
Digitally signed by Elaine B. Stiles
Date: 2018.11.14 10:38:38 -05'00"

Investigator’s signature

For HSRB Board use only:

Tracking #: __________________________

[Check one] Committee decision regarding review:

○ EXEMPT ○ EXPEDITED ○ FULL

[Check one] Approval status:

○ Approved ○ Resubmit

Platania, Judith
Digitally signed by Platania, Judith
Date: 2018.11.14 10:38:39 -05’00"

Signature of Chairperson Date

All on-going projects must be renewed one year after the approval date.