



PRESERVATION ALLIANCE FOR GREATER PHILADELPHIA

2022 STRATEGIC PLAN

INTRODUCTION

This strategic plan is meant to guide the Preservation Alliance as it pursues the following goals, which took shape during conversations over the last year involving its board, executive director, staff, members, as well as its peers, partners, allies, and critics:

- Protect the historic character and neighborhood quality of life that distinguish Philadelphia and help it thrive.
- Preserve the integrity and beauty of the places and spaces where key moments of the Philadelphia story unfolded.
- Preserve the stories of all the races and communities that have come together to make this city special, while not ignoring or downplaying the moments of darkness and pain those communities may have endured.
- Advocate for preservation to play its rightful, useful role in our community's efforts to combat climate change, provide housing, pursue justice, and grow jobs.
- Fight to ensure our city does not foolishly undervalue or erase the history and architectural beauty that have been central to its appeal for centuries.
- Act with passion for community engagement, a deep commitment to equity, and an abiding belief in William Penn's vision of Philadelphia as a city of verdant beauty, welcome, opportunity and tolerance.



TABLE OF CONTENTS

I. EXECUTIVE SUMMARY

II. REVIEW OF LISTENING AND DISCOVERY PHASE

III. 8 TOUCHSTONE PRINCIPLES

IV. 6 STRATEGIC ARCS OF ACTION

V. THE KCV TEAM

VI. APPENDICES

A. REPORT ON THE STAKEHOLDER INTERVIEWS

B. MEMO ON THE PEER ORGANIZATION LEADER INTERVIEWS

C. 10 TRENDS TO PONDER

D. REPORT ON THE MEMBER SURVEY

E. PLAN FOR THE RETREAT

F. SOCIAL MEDIA MEMO

G. SAMPLE LOGIC MODEL - ARC 1



The elements of this five-year strategic plan emerged from a six-month process of discussion and discovery that engaged the Alliance’s board, staff, and members, along with various outside stakeholders.

The discovery process was led by a consultant, Keystone Civic Ventures LLC (KCV), which compiled this report. The steps included meetings with the executive director and board members, 12 half-hour interviews with key stakeholders, two December forums that engaged a broader cross-section of community stakeholders, a board-staff retreat, and an iterative process of board and staff members reviewing and voting on proposed strategic themes and specific action steps.

The pillars of the strategy are eight “touchstone principles” for how the Alliance should go about pursuing its mission over the next five years. These principles can be used to help the Alliance stay on track strategically, no matter what unforeseen events, reversals or windfalls should crop up in the coming years.

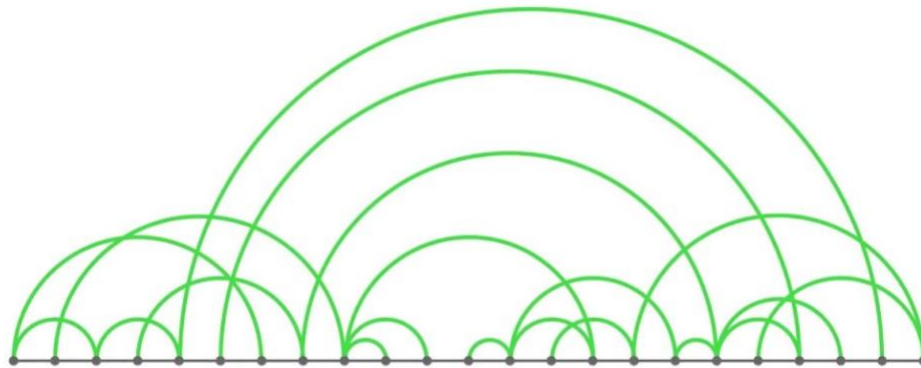
The plan then details six strategic arcs for action over the next four years. These arcs show how the principles can be applied continuously to devise, test, deploy and revise tactics year-by-year to fulfill the long-range strategy.

Based on the fruits of its discovery propose, KCV identified 10 national/global trends or issues, each having a particular Philadelphia resonance, that the Alliance should reckon with as it pursues this strategy in the coming years. They are listed briefly in this Executive Summary, then discussed in depth in Appendix C.



THE EIGHT TOUCHSTONE PRINCIPLES

- 1) We are a true alliance, attuned to its times.
- 2) We pilot, test, evaluate and learn, then decide whether to expand, rework or abandon.
- 3) We strive to make equity and inclusion a habit, not a pose; we are participatory, not performative.
- 4) We preserve stories as well as buildings, neighborhood character as well as cornices.
- 5) We advocate with optimism, seeking to shift Philly's "Overton Window" when it comes to preservation.
- 6) We nurture practical preservation throughout the city.
- 7) We enlist the young in preserving the historic, so we can build the Alliance to last.
- 8) We court time and talent as well as treasure. We build capacity by diversifying our human, social and fiscal capital.



THE SIX STRATEGIC ARCS

Arc 1: Build connection for equity and impact

Arc 2: Tell the preservation story

Arc 3: Use elections as a springboard to advocacy

Arc 4: Enlist and engage rising generations

Arc 5: Help property owners be preservationists

Arc 6: Build up fiscal, social, and human capital

- a) Diversify funding streams**
- b) Build a flexible, powerhouse staff and volunteer team**

10 Trends to Ponder

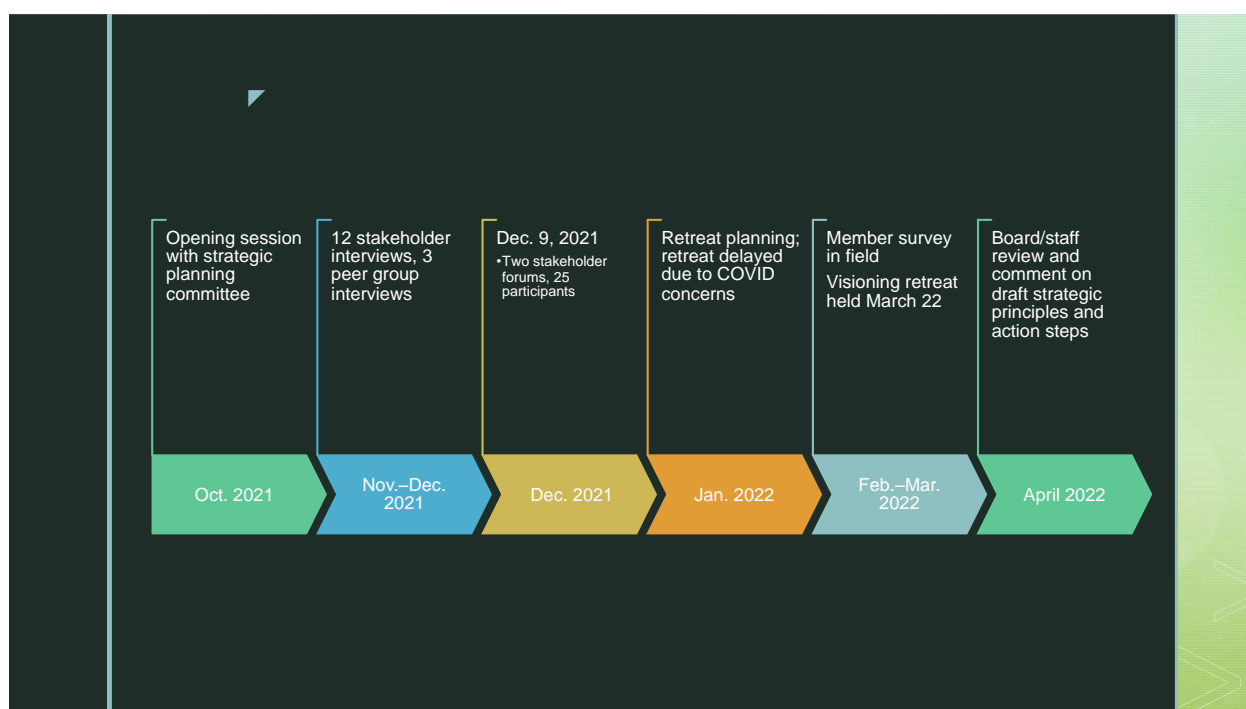


See Appendix C for more detail.

- 1) Equity and social justice
- 2) Climate change
- 3) New urbanism
- 4) Affordable housing
- 5) Cultural memory
- 6) Storytelling
- 7) Crowdfunding
- 8) Gen Z/Millennial attitudes
- 9) The power of networking
- 10) The gig economy



REVIEW OF THE LISTENING AND DISCOVERY PHASE



As shown in the graphic above, Keystone Civic Ventures’ efforts to learn from the Alliance’s stakeholders, members and peers had six distinct steps:

1) STAKEHOLDER INTERVIEWS

November and December, a set of 12 in-depth interviews were conducted on Zoom with people identified jointly by the KCV team and Alliance staff as stakeholders of some sort in the Alliance’s work. Each stakeholder consented to an interview of at least 30 minutes.

KCV's Brian Armstead led the interviewing, using the same question protocol each time, with other team members taking part in different interviews. Each Zoom interview was recorded, and extensive notes were taken. To encourage candor, interviewees were assured that while their words might be quoted and their ideas cited during the process, they would not be linked by name to any comment or observation. The interviewees were: Leo Addimando, Sally Elk, Susan Glassman, Alan Greenberger, Starr Herr Cardillo, Barbara Kaplan, Randy Mason, Sharmain Matlock-Turner, Roz McPherson, Nikil Saval, Craig Schelter, and Laura Spina.

A detailed summary of the input from the interviews, with many quotes from the discussions, is provided as Appendix A.



2) Stakeholder forums

Two stakeholder forums were held on Zoom on Dec. 9, one in the morning and one in the late afternoon. While the interviews were conducted with people who had extensive familiarity with the Alliance, these forums cast a wider net, looking for activists and nonprofit leaders whose work might connect in some way with the Alliance's. Also invited were some people known to be creative and wise thinkers about the city and nonprofit work.



At each forum, participants discussed what preservation means to them; how they'd adjust the Alliance's mission statement, and how'd they recommend pursuing particular goals that arose from the mission statement discussion. The digital collaboration platform Mural was used to collect and organize input from the forum participants. Here are the links to murals from the morning and evening sessions:

- [Morning Session Group 1](#)
- [Morning Session Group 2](#)
- [Morning Session Group 3](#)
- [Evening Session](#)

Participants in the morning forum were: Veronica Ayala, Randy Baron, Juliana Buchanan, Emily Cooperman, Jon Geeting, Susan Glassman, Rick Gross, Ashley Hahn, Bob Jaeger, Nathaniel Popkin, Rick Sauer, Craig Schelter, Suzanne Singletary, Thaddeus Squire, Ed Tettermer, Robert P. Thomas, Josh Warner, and Sydelle Zove.

Participants in the evening forum were: Alex Balloon, Oscar Beisert, Jim Duffin, Barbara Kaplan, David Perri, Zabeth Teelucksingh and Shannon Wink.

3) Peer organization leader interviews

Three CEOs of preservation organizations outside of Philadelphia were interviewed using an interview protocol. Zoom sessions led by Chris Satullo were conducted with Greg Galer of the Boston Preservation Alliance and Johns Hopkins of Baltimore Heritage. (Galer was interviewed in November 2021, before he announced his departure from the Boston nonprofit.) Peg Breen of the New York Landmarks Conservancy filled out a written questionnaire. A report summarizing these interviews is attached as Appendix B.

4) Member Survey

Keystone Civic Ventures designed a survey that was sent to 1,158 current and recently lapsed members of the Alliance in late February. The survey zeroed in on member satisfaction, preferences, and willingness to support the Alliance either through donations or volunteering. The survey was kept open through March 11. Several reminder emails were sent, including one offering a drawing for a Reading Terminal Market gift certificate as an incentive to fill out the survey.

In the end, 349 responses were received, a robust response rate of 30 percent. A full report on the member survey, with ample quotes from the responses, is attached as Appendix D.

5) Board and staff strategic visioning retreat

This day-long session for the Alliance's board and staff was held March 22 at the Cosmopolitan Club in Center City. All Alliance full-time staff – Paul Steinke, Susan Matyas, Patrick Grossi, Jennifer Robinson, and Vinni Cheng – took part.

The following board members participated: Francesca Ammon, John Carr, Stephanie Craighead, Mary DeNadai, Gregory DeShields, Barbara Eberlein, John Hanson, Russell Harris, Anthony Manino, Robert Powers, Leah Silverstein, Ian Smith, Janice Woodcock, and Yue Wu.



The KCV team opened by doing a detailed review of insights and findings from the discovery process.

The core of the retreat was a visioning exercise called *The History of the Future*. It challenged the group to imagine in vivid detail what a fully successful Preservation Alliance would look like, act like and be doing in the year 2027, then to write “a history” of how the Alliance evolved into that powerhouse from where it was in 2022: What did it start doing? What did it stop doing? What did it keep doing, only better? Who became its key allies and partners? Where did the money come from? What was the impact on the city and its people? A copy of the discussion prompt and the full run of show for the day is provided in Appendix E.



Two different versions of that future – one proposing moderate change with continuity, one more dramatic ambitions and change - emerged and were fleshed out in two distinct concluding presentations by two teams made up of staff and board members.

6) Post-retreat review and voting

After the retreat, the KCV team compiled a written distillation of more than 55 distinct ideas and actions steps that bubbled up from the discovery process and the retreat, organized under eight guiding principles. Board and staff members were invited to comment on the principles and action steps, and to rank them from highest to lowest priority.

These votes and comments helped cement certain of KCV's recommendations as part of the final strategy, while defining other elements that were regarded as optional/conditional or controversial and still up for debate. The 6 Strategic Arcs sections contains color-coded notations of which items were deemed conditional or up for debate.



THE EIGHT TOUCHSTONE PRINCIPLES

IN DEPTH

These eight principles are distilled from input and suggestions offered by both internal and external stakeholders.

They are intended as touchstone statements that can anchor the Alliance's thinking and daily actions throughout the execution of this strategic plan.

The principles are framed as "we" statements, expressing a collective intention of the board, the executive director, and the staff.

At the end of each principle comes a "daily question," intended as a checkpoint that staff can refer to every workday to align their efforts with the organization's core principles and long-term aims.

1) We are a true alliance, attuned to its times.

We work to transform preservation's brand into one that's unifying, not niche. We seek to nurture the connections, conversations and partnerships that can lift the preservation

agenda, even when the conversations might prove difficult or the people on the other side might initially seem reluctant.



We let listening fuel our leadership. We know that genuine listening is the best way to reach across our region's geographical, philosophical and racial divides to begin dialogue and foster powerful ties.

We seek to be a good ally, able to discern which moments call for quiet assistance and which might demand bold leadership.

That said, we know that if we don't speak up clearly and bravely for preservation, we will fail our mission. Yet we also know that the stronger our alliances, the wiser and more powerful our voice will be.

Here is the question we ask ourselves daily, to keep us attuned to this principle:

WHO CAN WE REACH OUT TO TODAY, WHAT CAN WE LEARN AND HOW CAN WE BE CHANGED BY WHAT WE HEAR?

2) We pilot, test, evaluate and learn, then decide whether to expand, rework or abandon.

We want to be ambitious, rising to meet the moment and serve the needs of our city. But we also recognize that we are a small organization that could easily overreach, become swamped and burn out.

So, we believe it is wiser, given the size and complexity of Philadelphia, to pursue key goals deeply and well in one part of the city, rather than to attempt them superficially and ineffectively throughout the region. This also allows us to introduce new activities and strategies to our existing supporters so we can bring them along on the journey.

Our approach to initiating the new programs and activities contained in this strategic plan relies on those words above: pilot, test, evaluate, learn, and decide.

This means we will not always wait to try out an idea until perfect conditions exist, such as full funding and staffing for a citywide effort. But neither will we jeopardize the organization by making big commitments that exceed our potential grasp.

We will look to be bold and take risks to test new ideas – but we will do so through pilot programs launched on carefully selected turf. We will use tools such as logic models to plan out needed resources, short- and long-term steps, hopes for short- and long-term impacts, and key metrics for determining those impacts.

When a pilot succeeds, we will identify what worked well, then seek to duplicate it at a broader scale. When pilots stumble, we will identify lessons learned, then decide whether to revise and retry, or simply scrap the idea. We will pride ourselves on recognizing failure and learning from it, without that leading us into either finger pointing or excessive caution.

THE DAILY QUESTION: WHAT CAN WE DO TODAY TO TEST AN IDEA AND LEARN FROM THE EXPERIENCE?

3) We strive to make equity and inclusion a habit, not a pose. We are participatory, not performative.

We acknowledge, as we craft this strategic plan in 2022, we are an organization with a mostly white staff, a mostly white membership and a board that still has work to do before it fully reflects the mosaic of Philadelphia. We pledge that as we work our way through this strategic plan, that previous statement will become steadily less true.

We pledge to think deeply about what equity and inclusion truly mean in our chosen field of preservation in our beloved city of Philadelphia. We vow to continually refresh this understanding through outreach to and conversation with diverse voices.

Based on our definition of equity, we will constantly review and revise every aspect of our operation – from tours to events to member recruitment to fund-raising to advocacy to easements – to make sure they all display, not obscure or undermine, our commitment to being the equitable preservation voice our magnificently diverse city deserves.



We will strive to be a good ally and partner to other groups and initiatives with whom we share the work - e.g., the Marian Anderson Museum, the Henry Assawa Tanner House, and the Strawberry Mansion community - seeking always to distinguish between the moments that call for us to educate, guide or lead, and those that call upon us simply to listen, learn and support.

THE DAILY QUESTIONS:

WHAT CAN WE DO TODAY TO CHALLENGE OR REMEDY UNJUST PRACTICES THAT HOLD BACK OUR CITY AND MANY OF ITS PEOPLE?

WHAT CAN WE DO TO AMPLIFY THE VOICES OF UNDER-HEARD COMMUNITIES AND HELP THEM TAKE ACTION TO STRENGTHEN THEIR NEIGHBORHOODS?

4) We preserve stories as well as buildings, neighborhood character as well as cornices.

We believe Philadelphia's history and its rich architectural and planning heritage remain strengths of the city. They contribute mightily to its economic health and its cultural, spiritual, and neighborly well-being. That is why we are preservationists.



But we know that not everyone in our city is an architect or historian. For many, the key to their city's historic charm resides not in design details or facts from an earlier century.

Instead, they most value that hard-to-define but easy-to-detect quality called neighborhood character. We pledge to see the forest even as we also fight to save a tree, to remember that neighborhood character is a jewel we should fight as hard to protect as we do a gem of a building.

We recognize that preservationists should never be seen as valuing just one group's aesthetic legacy, just one group's story of arrival, acceptance, and growth, just one version of the multihued history of our diverse, dynamic, and imperfect city.

We also understand that, for some Philadelphians, the history embodied in a building - and celebrated by some - may be for them darker, more painful, and less worthy of laurels e.g., the city's Police Administration Building.

In doing our work, we will strive to be aware of such cases and to tell a site's story in its full complexity, both light and shadow.

We pledge to honor and preserve the full story of our city's history, which includes people of many origins and races and which, if told honestly, must sometimes include stories of exclusion, appropriation, abandonment and demolition.

And when a building that tells a crucial piece of a community's story is no longer standing – or when the building includes multiple stories, not just those of one successful group – we will continue to hone our skill at finding and including the stories of people formerly left in the background or outside the frame.

Sometimes, this will mean taking leadership in telling a story. Other times, it will entail being helpful allies to excluded groups as they fight to tell their own story and have it be widely heard and honored.

We are open to new digital methods of preserving and telling the stories behind the buildings and will strive to get continuously better at understanding and using those tools.

THE DAILY QUESTION: WHOSE STORY WILL WE SEEK TO UNCOVER OR TELL TODAY, AND WHAT WOULD BE THE MOST FITTING WAY TO TELL IT?

5) We advocate with optimism, seeking to shift Philly's sense of the possible when it comes to preservation.

At the Alliance, we do not simply accept with a world-weary shrug aspects of Philadelphia policy or politics that complicate or thwart the work of preservation, no matter how deep-seated those attitudes or practices might be.

In political science, the term "Overton Window" denotes the range of policy proposals that are, at any given moment, considered realistic and worth discussing. A key job of the

advocate is to shift the Overton Window so that your most ambitious ideas are no longer considered undoable or radical, and instead are woven into the ongoing political conversation. Equally valuable is to critique practices or policies that are antithetical to your goals and nudge them outside the window, so that few consider them acceptable anymore.



We work hard to shift Philadelphia's window in a direction that honors and enables preservation. We make sure that people understand the vital role preservation can play in combatting climate change, social injustice, and economic decline.

We are never nasty or intransigent. But we are always persistent and persuasive. We deploy facts, research, fair argument, dialogue, organizing, negotiation, and media savvy to shift the window in

directions that support preservation and enhance neighbor character, equity, and stability.

THE DAILY QUESTION: WHAT CAN WE DO TODAY TO MAKE PHILLY'S POLITICS, POLICIES OR NEIGHBORHOOD DIALOGUES MORE SUPPORTIVE OF SMART PRESERVATION?

6) We nurture practical preservation throughout the city.

We reach back into our history to meet the city's future needs, reviving for a new day in a new way programs that once were our hallmark.

We will seek resources and partners to build out an ever more robust program of preservation education and assistance for not just for homeowners, but also property owners and developers working in all of Philadelphia's neighborhoods.



We will continue to make forcefully the economic and aesthetic case for historically sensitive adaptive reuse of commercial and institutional properties, while connecting all types of property owners - residential, institutional, and commercial - to sound advice on how to achieve that.

Without surrendering core preservationist principles, we will also explore ways to advise homeowners on cost-effective ways to use acceptable modern methods and materials to renovate buildings in a historically sensitive way.

THE DAILY QUESTION: WHAT CAN I DO TODAY TO HELP A PROPERTY OWNER OR DEVELOPER DO WORK THAT PRESERVES THE CHARACTER OF A BUILDING OR NEIGHBORHOOD?

7) We enlist the young in preserving the historic, so we can build the Alliance to last.

We work creatively and steadily to engage rising generations under the age of 40 in the work of preservation and in support of the Alliance.

Even as we promote the value of preservation and explain its sometimes-complex workings to younger Philadelphians, we learn eagerly from them how they see (or perhaps don't see) our goals connecting to the other issues about which they are passionate.

We will work collaboratively with them to craft a strong, vivid definition of preservation that links our work to the ongoing efforts to combat climate change, expand affordable housing and promote equitable, sustainable communities.

We do this above all to support a vibrant, healthy Philadelphia. But we will do it also to ensure the Preservation Alliance's own survival. We know its fiscal health depends on its membership and donor base getting younger (as well as more diverse). That will only happen if these rising generations come to view the Alliance as relevant, enlightened, impactful, and collaborative, and thus worthy of their support.



We strive to adjust the tone and content of our programs and events to attract Philadelphians under 40. We pursue a smart social media strategy to connect with them effectively. We seek out and act upon their advice. We amplify their voices and create spaces where they can discover their capabilities as preservation advocates. We partner with organizations important to younger Philadelphians.

We seek out partners who can help us instill a familiarity with and passion for preservation among Philadelphia's school-age youth. We also seek partnerships with trade schools and trade unions to offer young workers the chance to learn preservation skills.

THE DAILY QUESTION: WHAT CAN I DO TODAY TO PLANT, NURTURE OR HARVEST A PASSION FOR PRESERVATION AMONG PHILADELPHIANS UNDER THE AGE OF 40?

8) We court time and talent as well as treasure. We build capacity by diversifying our human, social and fiscal capital.

We recognize that to achieve what we hope for Philadelphia, the Alliance needs to build its capacity – in terms of revenue, staff, skills, and geographic reach.

We realize the capital we need to expand our impact can come in multiple forms – fiscal, social, and human. We know we can and should diversify our sources of all three.

Fiscal: We seek to protect and grow the sources of revenue that have put the Alliance on firmer fiscal ground – events and programs, member donations and easements. We are open to new approaches for enhancing those core revenue streams.

We embrace the challenge of increasing foundation grants and targeted philanthropy. We are alert to opportunities to seek government grants or contracts to do consulting or community engagement – if it fits squarely within our strategic goals and core skills. We are exploring the possibility of using crowdfunding to support specific projects suited for that approach.

Social: We are eager to forge useful partnerships with others who toil in the same vineyards. We know that through partnership we can increase our reach and impact. We are aware that sometimes in partnerships we will play a lead role, at others a background, supportive one.



Human: We strive systematically to discover, invite, and tap into the energy and expertise of our members as volunteers. We make it clear to our members and potential members that we value their time and talent, not just their money, as a genuine contribution to our mission. We are clear and specific with the public about the tasks and ways they can most effectively contribute their time or expertise.

We also recognize how important the skill, dedication and passion of our small staff is to our organization’s ability to “punch above its weight.” We foster a caring, flexible, respectful work culture that values the staff’s input and professional development, while creating space for them to take on new challenges and help the Alliance meet the ambitious goals of this plan.

Finally, we are open to experimenting with the flexible arrangements of the gig economy to bring in part-timers, independent contractors, or paid interns from local universities to perform discrete tasks on a time-limited basis. This is a key tactic when we ramp up pilot projects to test new ideas.

THE DAILY QUESTION: WHAT CAN WE DO TODAY TO GROW THE CAPACITY OF OUR ORGANIZATION, BOARD, STAFF, MEMBERS OR PARTNERS TO SUPPORT SMART PRESERVATION.



- * Watch out for jargon--esp for parts that will be public-facing.
- * Too much of the action is weighted toward Year 1. Is this feasible? Are #s achievable? How will we prioritize?
- * Many strategies call for a pilot, but how will we evaluate that pilot? What questions will we ask?
- * Should there be more in here about saving buildings and physical fabric (our core mission)?

THE SIX STRATEGIC ARCS FOR ACTION

This section reviews six strategic arcs for action over the next five years.

It seeks to make concrete and operational the touchstone principles articulated above. Action steps presented under each arc heading fall into two buckets: near-term and doable, or longer-term, ambitious, and conditional.

This section puts into practice the Pilot-Test-Learn-Evaluate-Decide principle. It envisions an energetic effort over the next two years to try out and evaluate various ambitious action items.



Next, it envisions a pause to evaluate those efforts based on sound metrics. At that point, the Alliance would adjust course, doubling down on effective steps, abandoning ineffective ones, and making choices about which long-term, ambitious goals it has capacity to pursue, and which must be put on hold.

The lists of action steps under each arc below are color-coded. **Conditional** indicates the step is contingent on factors or outcomes not fully under the Alliance's control or is contingent on an earlier step proving out as effective. **Debated** signals an idea for which strong support existed from some board or staff members, but with others expressing doubt as to the feasibility or desirability of the idea. Further discussion and a final decision are needed on the steps so designated.

ARC 1 – BUILD CONNECTION FOR EQUITY AND IMPACT

Do concerted outreach to communities of color, connectors, issue advocates and members

YEAR ONE

- Reach out to neighborhood organizations throughout the city – RCO's, CDC's, civics – to invite them to come together to discuss how the Alliance can help them protect and enhance their neighborhoods. Offer digital or in-person options. Convene an event or events, with the goals of building connection, getting a deeper sense of ground-level concerns, beginning to build a watchlist

of endangered buildings and sections, and getting feedback on what kind of preservation advice in what forms would be most useful to these groups. Follow-up with a survey, inviting suggestions as to next steps.

- Create at least one new opportunity for developers to dialogue with the Alliance and each other about preservation issues.
 - Continue conversations with Partners for Sacred Places about the black churches initiative/grant. Connect and confer with black pastors/church leaders to bolster the application's narrative about the role these churches play as centers of community.
 - Continue to offer some digital programs - or hybrid events with an option for digital participation - to maintain and expand the connections that the Alliance's deft pandemic-era digital pivot helped earn.
 - Experiment with at least one new form of event (e.g., happy hour, neighborhood meet-up) whose main purpose is to allow preservation-minded Philadelphians to get to know one another personally.
 - Continue expanding the tour program to cover the sites and history of minority neighborhoods, recruiting residents as advisers and tour guides.
 - Using the equity audit done in 2020 as a foundation, amplified by consultation with your neighborhood contacts, develop and promote an Alliance definition of what equity in preservation means.
 - Research promising and inspiring equity initiatives by similar nonprofits around the country and seek to learn from and emulate them.
 - **Debated (as to feasibility):** Establish an *Every-ZIP Initiative*, with the goal that within five years the Alliance will have members, at least one partner and one accomplished or ongoing initiative affecting every ZIP in the Philadelphia area. **Reframe as an Every-Neighborhood Initiative, perhaps aligned with the 17 Planning Districts (as a proxy for neighborhoods).**
 - Actively recruit diverse individuals to sit on Board committees. **Committee member expectations should be articulated. Are we fully leveraging the volunteers we already have?**
 - Support the efforts of leaders in the African-American preservation community to organize and strengthen preservation within the Black community. This could include helping to secure space for meetings, technical support, and education around preservation issues, helping to connect and provide access to major institutional players in the city/region, etc.
- * Introduce training sessions for realtors and property appraisers to expand their knowledge about historic preservation and the value of historic fabric.
- * Expand in-person programming (e.g., institute an annual members reception, which could possibly rotate among different neighborhoods, in conjunction with the Every-Neighborhood Initiative).

YEAR TWO

- Choose (with responses to the invitation described above as a key data point) one predominantly minority area of the city for a targeted outreach initiative. Identify key leaders and connectors in that area and meet them *on their turf* for a conversation about neighborhood concerns and Alliance's resources. Try to enlist them as the face and voice of preservation in their neighborhoods. Always ask them who else you should be speaking with. Pick at least one building/site in the neighborhood for which to develop a proactive preservation strategy, in concert with your neighborhood connections. Work with community leaders to develop at least one tour based in the neighborhood, with residents as guides. Hold at least one Alliance public event in that neighborhood. Hold office hours in the neighborhood, at a local church or nonprofit office, once a month, partnering with other expert sources to offer advice on housing renovation and protecting neighborhood character.
- Leverage this targeted outreach work to identify and recruit potential nominees to diversify the Alliance board.
- **Conditional:** If results of the first concentrated neighborhood validate the idea and staff capacity exists: Duplicate the concentrated neighborhood initiative in another part of the city
- **Debated (as to desirability):** Establish and begin to build out a community advisory board, inviting key connectors met during the community outreach process to join and help shape future outreach and advocacy efforts. **Suggest that we incorporate community members into existing committees, rather than cordoning them off into their own committee.**
- Continue expansion of the tour program.
- **Conditional:** Continue Every-ZIP initiative. **Every-Neighborhood Initiative**
- **Debated (as to extent and timetable of the goal):** Double the percentages of members who are from minorities / historically marginalized communities. (Get data by including an optional race/ethnicity question in all member surveys.) **Are these numerical goals achievable?**

LONGER-TERM

- **Conditional:** If black churches initiative is funded, help execute it and use it as an opportunity to connect and enlist with more local leaders in more minority neighborhoods of the city.
- **Conditional:** If the city survey of historical properties begins, seek a significant role in the community engagement piece of the work, to build upon and build out the Alliance's own neighborhood outreach.

- **Conditional:** Expand the targeted outreach initiative to more areas of the city.
- **Debated:** Build on “office hours” experiment to pilot the idea of a “satellite office” in a chosen neighborhood, which would occupy and activate an empty space of some historic interest. Program preservation workshops, art exhibits, story slams into the space.
- **Conditional:** Achieve the goal of the Every-ZIP initiative. **Every-Neighborhood Initiative**
- Achieve the goal of a board of directors whose racial/ethnic and geographic makeup mirrors that of the city.
- **Debated (as to feasibility of the goal)** Redouble the percentages of minority members.

ARC 2 - TELL THE PRESERVATION STORY

USE STORY-TELLING TO BOOST ADVOCACY AND UPLIFT ALLIES

YEAR ONE

- On either a contract or part-time basis, add capacity to execute the communications steps outlined in this arc.
 - **Conditional (depending on capacity):** Work with First Person Arts or a similar organization to jointly present a “story slam” based on a preservation theme.
 - Through outreach, identify one community group that’s seeking to tell a lesser-known story about a site or space in their community that’s worth preserving, and assist them in researching and sharing the story.
 - Review the recommendations of KCV’s social media consultant’s memo and decide which ones to implement.
 - Create a social media feedback loop with Extant. With each issue, formulate one discussion question connected to that issue’s content and invite people to discuss it on your Facebook page, giving them a link to join in.
- * Pursue grant funding for a one-year fellow to kick-start the communications initiative. Ideal candidate would be knowledgeable in the technical realm of communications and the topical realm of urban and architectural history. If successful, perhaps this individual could become a permanent staff member (with targeted donor funding).

- Systematically follow or friend all the organizations and people you are connecting with through the Arc 1 outreach initiatives and try to share and retweet their posts as often as possible.
- Do some A/B testing of different designs, images and content moves for the Alliance newsletter, to test how to improve open and click rates on this key communication device.
- Tell and spread the story of the Eastern North neighborhoods tour initiative through the faces and voices of your neighborhood allies there.
- Survey Young Friends group to see if any of them, or their friends, has digital story-telling skills they'd be willing to offer on a volunteer basis.
- Investigate possibilities for finding a student studying mapping/data visualization at a local university to build a map documenting the fruits of the Every Zip initiative for the organization's website.
- * Produce short, simple videos that tell bite-sized preservation stories (e.g., drawing on the example of Baltimore Heritage's 5-Minute Histories). Content might draw upon existing nominations, but also larger and more phenomenological concepts like "sidewalks," etc. Part of the goal is to expand public conception of preservation well beyond aesthetics alone (or first and foremost).

YEAR TWO

- Develop a "How We Can Help" vertical on the website, pulling together in user-friendly form (FAQ's, key terms, step by step diagrams etc.) information on preservation rules, incentives, assistance and government process for property owners and community groups.
- **Every-Neighborhood**
Conditional (based on capacity) Develop the Every-ZIP Map, an interactive, updatable map – living on the website – that shows the history and status of Preservation Alliance initiatives and interventions all over Philadelphia. It should link to archived material on sites and provide a user form people can fill out to alert the Alliance to rising issues in a neighborhood.

LONGER-TERM

- Debated (as to worth of idea) Investigate grant possibilities for a Storyteller-in-Residence program.
- Conditional (depending on capacity/fund-raising) Connect with Plan Philly/WHYY or another public-interest media outlet to discuss idea of a regular Preserve Philly podcast that could amplify the Alliance's advocacy message and community engagement.

ARC 3 – USE ELECTIONS AS A SPRINGBOARD FOR ADVOCACY

CONNECT PRESERVATION TO PHILADELPHIA’S TOP-OF-MIND ISSUES

YEAR ONE

- Develop one-page documents and/or graphics laying out in simple terms how preservation is part of the solution to issues on Philadelphians’ minds e.g., climate change, affordable housing, equitable neighborhoods. Post on website, share on social media, circulate to partners and members, seek to publish related commentaries in city outlets. **Note: These brief white papers are critical for several pieces of the plan and should be a top priority**
- Develop the Alliance’s “Move the Window” agenda of the key changes in city tax incentives, regulations, budget, and process needed to enhance preservation. Share the agenda with partners and on social media to inform the city election dialogue.
- Discuss preservation/planning issues with leaders/members of underrepresented communities. Ask their opinions, especially noting concerns and areas of disagreement. Determine if the advocacy agenda needs to be adjusted to account for these concerns. Also, ask how the issue can be framed and communicated within their communities to increase grassroots advocacy.
- Partner with allied advocates around the city on initiatives to ensure preservation/planning issues get aired well during the city elections e.g., candidate forums, surveys, and interviews. Be sure to engage your members and community partners in framing questions to be asked of candidates for mayor and city council.
- Meet with all serious mayoral candidates to discuss the “Move the Window” agenda items.
- **Debated (most hotly disputed recommendation to emerge from the retreat)** Continue watchdogging the Historical Commission and related panels - but seek to reduce the amount of staff time devoted to the effort. Seek to recruit and train board members or volunteers to do some of the monitoring.
* **Expand focus beyond the Commission alone to also include the Planning Commission. In general, take a more holistic approach to advocacy and engagement.**
- Continue to support efforts to begin and execute the city survey of historical properties.
- * **Reach out to RCOs and CDCs to tell an integrated story and ally forces in advocacy.**

YEAR TWO

- Meet with the new mayor and key council members to familiarize them with the Alliance’s advocacy agenda.
- Expand the agenda to include desired state reforms and actions, particularly around funding for preservation. Share that state agenda with candidates for state House and Senate seats in the city in the 2024 election.

LONGER-TERM

- **Conditional (affected by political balance in Harrisburg and on Council)** Get at least two items on the advocacy agenda approved.

ARC 4 - ENTICE AND ENLIST RISING GENERATIONS

BE YOUNGER AT HEART TO BUILD AN ALLIANCE FOR THE AGES

YEAR ONE

- Ask the Young Friends group for ideas and suggestions on how to connect with more younger Philadelphians. Act on at least one of those suggestions in year one.
- **Debated (as to appropriate size of goal)** Increase the number of under-40 members by 20 percent.
- Design and hold at least two events aimed at younger Philadelphians that mix substance and fun/networking. (These can be events you'd hold anyway; just figure out how to add a bigger networking/fun component).
- Connect and seek to partner on programs with other under-40 organizations such as Young Involved Philadelphia. **Other potential partners include DVASE YMG, ASCE YMG, AIA young members (if there is such a group)**
- **Debated (some strong advocates for this while other's doubt staff capacity and cite mission creep)** Research K-12 school programs in this city or elsewhere that invite students to learn about preservation and identify historic buildings and sites in their own community. Identify and reach out to potential partners for preliminary discussions about developing and seeding this kind of program in schools based in Philadelphia (whether public, charter public or private). **Young Friends may be interested in playing a role here.**
- Connect with local universities to identify potential internship programs for their students.
- Reach out to local trade schools and trade unions to discuss how to begin or expand programs teaching preservation skills. **Leverage experience gained at Eastern State, which is currently doing a masonry academy with Pullman.**
- * **Encourage more senior design professionals to encourage their more junior employees to get involved with the committees as volunteers. It pays off in the long run for the individual (professionally) and the alliance (to obtain volunteers with knowledge).**

YEAR TWO

- Start at least one university student internship that helps the Alliance pursue core strategic goals.
- **Conditional upon this being ratified as a desired initiative:** Do one pilot program in a K-12 school (even if only a one-day visit).
- **Conditional on where the first-year target is set:** Increase the number of under-40 members by another 20 percent.

LONGER TERM

- **Conditional on if and how the first-year target is set:** Double the number of under-40 members from the 2022 level.
- Double the size of the Young Friends group.
- Add at least one more person who came up through the Young Friends to the Alliance board.

ARC 5 – HELP PROPERTY OWNERS BE PRESERVATIONISTS

DEMYSTIFY PROCESS AND HELP PEOPLE DO THE RIGHT THING

YEAR ONE

- Develop and offer a workshop, with related, accessible digital content, about sound preservation practices, connecting property owners to skilled contractors. Refine, repeat, and expand this effort in the out years of the strategy. **Given young first-time homeowners, workshops like these could also be a way to diversify membership to a younger audience.**
- Make clear to all stakeholders the key role of preservation in combating climate change and providing affordable housing. (Connects to bullet point under Advocacy arc. Would make use of talking points developed under that arc.)
- Promote adaptive reuse of larger properties by identifying local examples and telling their stories on social media, web and in workshops. (Connects to Storytelling arc.)
- **Debated (as to fit with core philosophy)** Identify acceptable, affordable ways to preserve historic character and features using modern materials - then begin educating homeowners, businesses, and developers about them.

- * **Educate homeowners about potential grants.**

YEAR TWO

- Partner with trade schools and building trades to train young people in the skills of preservation work. (Connects to bullet point under Engage Young People arc.)
- **Conditional upon ability to raise money from government or philanthropic sources:** Raise funds to offer city homeowners grants/affordable loans to execute preservationally sound home repairs and renovations. (Partner with other nonprofits and agencies doing similar work.)

LONGER TERM

- **Conditional:** If fund-raising succeeds, launch homeowner grant/loan program, establishing income guidelines and rules, and hiring staff to run the program.

ARC 6 – BUILD UP FISCAL, SOCIAL AND HUMAN CAPITAL

Part A) Diversify revenue streams

YEAR ONE

- Review set-up of major events. Do a survey of key sponsors and donors to the annual gala to get their ideas on what to keep and what to alter.
- Review and revise membership levels with an eye to optimizing potential donations.
- Give key donors personal reviews of the strategic plan and invite them to identify any initiatives they would like to sponsor/support.
- Visit key Philadelphia foundations to update them on the strategic plan and identify any initiatives that mesh with their current priorities.
- ~~Research idea of bringing on a consultant to identify and pursue potentially lucrative easements in inner ring suburbs.~~

- Further familiarize organization with crowdfunding i.e., key platforms' rules, strengths and weaknesses, success stories from other preservation groups.
- As outreach program develops, connect with business owners and developers in those sections of the city to inform them about the Alliance's activities in support of their neighborhood.
- * Leverage white papers (Arc 3) on what preservation is good for to approach big corporate donors (e.g., banks, Comcast, etc.) that could also conceivably become strong supporters (similar to how such organizations often support the arts).

YEAR TWO

- * Work to establish a secure financial foundation for the organization through creation of an endowment.
- Make any changes to major events that were decided upon based on first-year review.
- Make any changes to membership levels recommended by first-year review.
- Identify at least two strategic pilot initiatives for which to seek foundation funding. Do the grant applications.
- Conditional: Decide whether to pursue suburban easement strategy. If yes, begin.
- Pick an initiative congenial to crowdfunding and plot out what it would take to achieve a successful crowd-funding project

LONGER TERM

- Conditional upon Year 2 review producing an attractive plan: Attempt a crowd-funding project.
- Develop one or two "exclusive opportunity" events to attract/reward major donors.

Part B) Build a flexible, powerhouse staff and volunteer team

YEAR ONE

- Add a part-time administrative assistant to free the executive director and other staffers to focus more on high-priority tasks.
- Create a professional development plan for each staff member, including training opportunities and occasional detached time to work on strategic initiatives.

- Identify any new opportunities for strategic tasks to be handled or significantly aided through “gig economy” additions – part-timers, independent contractors, interns.
- Identify additional tasks – both clerical and involving expertise – that could appropriately be handled or helped by volunteers. Include roles that people can fulfill from home or in their neighborhoods. Survey Young Friends, members, and community contacts to find out which of these tasks might appeal the most to them.
- Seek funds to create a tour stipend program for guides. (This relates to the Equity principle and arc.). Create a program where guides could waive their stipends to underwrite a stipend for guides in another part of town.

YEAR TWO

- **Debated (as to organizational capacity to achieve):** Build a potential “ladder of engagement” for members and other potential volunteers laying out different ways, involving different skills and time commitments, that they could contribute to the Alliance’s mission. Tie the steps on the ladder into incentives and rewards – e.g., in-kind-contribution membership, swag, public recognition, badges, progression to stipends or part-time jobs. Cost out the initiative. Identify a “super volunteer” or part-time worker who could assist staff in running the program.

LONGER TERM

- **Debated:** Launch and promote the expanded volunteer program.
- Review initiatives of first two years, identify any whose success might justify adding full-time staff to expand and run them e.g. neighborhood outreach coordinator; storyteller-in-residence; volunteer coordinator; equity coordinator etc. Develop job descriptions and seek funding.



THE KEYSTONE CIVIC VENTURES TEAM

CHRIS SATULLO was the project lead and principal author of the strategic plan. He is the founder and principal of Keystone Civic Ventures LLC, a civic engagement, media, and strategic planning consultant. He is a former editorial page editor of the Philadelphia Inquirer, vice president/news for WHYY public media and syndicated newspaper columnist. He is co-founder and co-director of the PA Project for Civic Engagement. He has won more than 60 awards for journalism and civic engagement. He is a former Fulbright Fellow and a graduate of Williams College.



BRIAN ARMSTEAD led the stakeholder interview process and co-facilitated the board/staff retreat. He has spent the bulk of his career working with communities, children, and families as an educator, social worker, mediator, and community advocate. A skilled facilitator and convener, he brings together diverse – and sometimes hostile - groups for meaningful and productive dialogue. He is the co-founder and former Co-Director of the David P. Richardson, Jr. Rites of Passage (for Black teenage males. He holds dual degrees - Master of Social Work (MSW) and Master of City Planning (MCP) - from the University of Pennsylvania. He also holds a Bachelor of Science degree in Marketing from the Pennsylvania State University. He is an adjunct professor of Human Services at Harcum College. Ventures.



MARISA DENKER conducted the member survey and the stakeholder forums that were part of the discovery process. She is co-director and co-Founder of Connect the Dots Inc., a civic engagement firm with branches in Philadelphia and Dublin, Ireland. Connect the Dots is an impact-driven, fully women-owned firm that specializes in stakeholder engagement for impact. Connect the Dots has deep experience in both Ireland and Philadelphia around improving cities and their planning and sustainability processes. Denker is a Fulbright Fellow, with a M.A. in Design Practice from Dublin University and a BA in Urban Studies and English from the University of Pennsylvania. She teaches a UPenn Urban

Studies course in civic engagement called *Participatory Cities*.

LINDA BREITSTEIN served as project manager. *She* is deeply experienced in community outreach, project managing and event planning. She has filled those roles with Catalyst Community Conversations and the PA Project for Civic Engagement for the last 15 years. She also served from 2018-20 as Eastern region coordinator for the Draw the Lines PA anti-gerrymandering project. Prior to joining PPCE in 2008, she worked as public relations director for WSBK-TV in Boston and media consultant to the Dana Farber Cancer Institute. She is a graduate of the University of Massachusetts.



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