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AN ANALYSIS OF COMMUNICATION TRENDS OF EAST COAST
HISTORIC PRESERVATION NONPROFIT ORGANIZATIONS

A Thesis
Presented to
the Graduate School of
Clemson University

In Partial Fulfillment
of the Requirements for the Degree
Master of Science
Historic Preservation

by
Caroline Hope Byrne
May 2024

Accepted by:
Dr. Jon Marcoux, Committee Chair
Dr. Laurel Bartlett
Sam Spence

ABSTRACT

Communication in preservation is key to elevate the momentum of preserving the built environment, historic communities, and cultural landscapes. Effective communication should expand diversity and inclusion of key demographics that have not been sufficiently reached via current or historic outreach methods. Intentional and direct strategies to message specific communities could make an impact on the future success of preservation.

This thesis uncovers the trends of current communication practices at historic preservation nonprofits along the East Coast in an effort to evaluate factors that impact methods and evaluation. The purpose of this study is to understand the current methods deployed by nonprofits in their communication programs. The data analyzed includes methods of communication, focus areas, target audiences, resources, and measurement strategies. The goal is to understand if there are organizational implications based on budget, geography, membership, audience focus, and communication resources.

A detailed survey of East Coast historic nonprofits provided baseline data to evaluate trends across a variety of factors. Selected follow-up interviews provided context to the survey responses. The results show that organizations with an annual operating budget of over \$1 million and the presence of a formal communications role have an impact on an organization's communication strategy. This research serves as benchmark data for organizations that are looking to institute a communication plan.

DEDICATION

To my parents, Kevin and Maura, and my brother, Peter. Thank you for supporting me throughout my academic career.

ACKNOWLEDGEMENTS

I would like to acknowledge the historic preservation nonprofit organizations that spent time to respond to my survey, providing meaningful information for my research. An extended thank you to those who dedicated additional time and resources to participate in one-on-one interviews. This thesis would not be possible without the participants.

I extend my sincere thanks to my thesis committee members. First, thank you to Jon Marcoux for guiding me throughout this process and providing your constant support. Your willingness to immerse yourself in the world of communication to aid in my thesis means the world to me. Thank you to Dr. Laurel Bartlett and Sam Spence for your advice, thought-provoking questions, and suggestions to improve my research throughout the process.

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CHAPTER ONE: INTRODUCTION

This thesis explores communication strategies at East Coast historic preservation nonprofits. The data was gathered through the use of a survey and follow-up interviews to develop a baseline understanding of current communication methodologies. This thesis identifies trends amongst the respondents based on annual operating budget, staff experience, size of organizations, and geographic region on the East Coast. These factors were assessed to determine similarities and differences in the communication approaches deployed.

A marketing initiative should be based on identifiable goals and specific milestones to measure against respective targets. This specificity allows organizations to make informed decisions and provides the ability to update organizational intentions on an ongoing basis as plans evolve over time.¹ The goal of any typical marketing approach is to reach people who are most likely to take a desired action, and deliver the appropriate messages to them.² The first step to evaluate your options of communication is to set specific goals.³ The most common goals are awareness, demand generation (customer attraction), and/or lead conversion (converting prospects to revenue, or in the case of nonprofits, donations). Disciplined communication strategies and audience development in the advertising and media industry are the crux of planning for effective marketing

¹ Darian Rodriguez Heyman, *Nonprofit Management 101: A Complete and Practical Guide for Leaders and Professionals* (San Francisco: Jossey-Bass, 2011), 411.

<http://ebookcentral.proquest.com/lib/clemson/detail.action?docID=706532>

² Heyman, *Nonprofit Management 101: A Complete and Practical Guide for Leaders and Professionals*, 416.

³ Laura Lowell, *42 Rules of Marketing* (Cupertino, California: Super Star Press, 2012), <https://search-ebscohost-com.libproxy.clemson.edu/login.aspx?direct=true&db=e025xna&AN=477611>.

campaigns. While traditional consumer audience segmentation is tied to marketing efforts, methodologies for identifying current and future audiences can help enhance communication.

A secondary area of exploration was to determine how to segment groups of people for the benefit of preservation nonprofits. The challenge was to find groups of potential consumers with similar traits or those who have experienced defining moments that would connect them in common causes.⁴ “Persona based marketing” describes qualities and characteristics of a person that would fit a segment profile to expand a target audience beyond looking at demographic data. Thoughtful, research-driven data segmentation looks to identify interest groups with similar traits or those defining experience moments that would connect them in common causes.⁵

The objective-focused way to communicate starts with identifying “who” preservation nonprofits are trying to reach and for “what” purpose. Outreach and engagement strategies will differ depending on goals of the organization and messaging approaches. An organization's target audience can be defined as people you intend to influence with your strategic communication campaign. These people might be internal or external to your organization or membership. Careful delineation of each audience will lead to better understanding of interests and efficient engagement. Advertising constantly challenges an organization’s understanding of target audiences and essentials of

⁴ Charles D. Schewe and Stephanie M. Noble, “Market Segmentation by Cohorts: The Value and Validity of Cohorts in America and Abroad,” *Journal of Marketing Management* 16, no. 1–3 (January 2000): 129–42, <https://doi.org/10.1362/026725700785100479>

⁵ Lowell, *42 Rules of Marketing*.

marketing campaigns to gain impact of messaging.⁶

Audience segmentation should include reaching those who care about community causes, regardless of their age, race, or socio-economic status. Communication methods can be effectively developed and deployed to convey this message. Effectively targeting and reaching numerous market segments will expand awareness of current preservation efforts and challenges with the goal of engaging communities to encourage wider and deeper participation. Delivering the right message, at the right time, by listening to one's audience and understanding their motivation, can provide better insight and make a greater impact on goals.⁷ An important consideration for nonprofit organizations is to reach the appropriate audiences in an effort to facilitate capital planning, community involvement, and political advocacy efforts. To thrive, nonprofits must maintain and nurture public support with a diverse population. Sharing success stories that showcase the social, economic, and environmental benefits of historic preservation can result in renewed interest and additional funding.⁸

Nonprofit organizations must consider and identify key segments to reach via communication efforts. Groups for historic preservation nonprofits to consider include: 1) professionals, such as historians, educators, preservationists, and social justice organizations; 2) community leaders, residents, volunteers, and engaged community

⁶ Sara LaBelle and Jennifer H. Waldeck, *Strategic Communication for Organizations* (Oakland, California: University of California Press, 2020), 154, <https://search-ebscohost-com.libproxy.clemson.edu/login.aspx?direct=true&db=e025xna&AN=2345637>.

⁷ Liz Carlile, "Making Communication Count: A Strategic Communications Framework," *International Institute for Environment and Development*, June 1, 2011, 2, <https://www.jstor.org/stable/resrep01461>.

⁸ Advisory Council on Historic Preservation, "The National Historic Preservation Program at 50: Priorities and Recommendations for the Future," March 1, 2017, 9, <https://www.achp.gov/sites/default/files/documents/2018-06/Preservation50FinalReport.pdf>

members; and 3) cultural tourists, students, or frequent visitors interested in the preservation efforts in a defined region.

This thesis reflects the following definitions to provide a consistent approach.

Communication: the creation, transmission, reception, and processing of information by a person, group, or organization. The intended receiver of the information must be able to effectively understand the information.⁹

Market or audience segment: a group of consumers with distinct characteristics with the goal of dividing the marketing into specific groups based on needs, attitudes, and interests.¹⁰

Customer Analysis: understand what communications work within each customer base¹¹

The research survey was limited to East Coast preservation nonprofits. The survey posed specific questions to better understand the respective organizational methodologies for audience targeting, if they exist, as well as the communication and organizational goals of each entity. Responses covered the strategies, resources, methodologies, and measurements of existing communication programs. Another set of questions covered the experience of respondents, including educational background and training, to align

⁹ Kenneth E. Clow and Donald Baack, *Concise Encyclopedia of Advertising* (New York: Routledge, 2012) 35, <http://libproxy.clemson.edu/login?url=https://search.ebscohost.com/login.aspx?direct=true&db=e025xna&AN=685290>.

¹⁰ Clow and Baack, *Concise Encyclopedia of Advertising*, 103.

¹¹ Clow and Baack, *Concise Encyclopedia of Advertising*, 55.

communication strategies with the experience of the staff. Questions about the goals and mission of these nonprofits were designed to try to align marketing research with the goals of the organizations. However, upon data analysis, this lens did not produce relevant results. The data collected is not a nationwide representative sample of preservation nonprofits but a sample within the larger United States. While the information may not be applicable in all instances, the recommendations are intended to support efforts by most historic preservation nonprofit organizations. The follow-up interviews provided direct comparison points as well as useful resources for like-minded nonprofits. This information can serve as a platform for historic preservation nonprofits and similar organizations to identify and develop their communication strategies.

The survey data shows that both operating budget and presence of a communications staff member have an impact on communication strategies and methods of evaluation. Other survey factors were compared and analyzed, such as geographic region, however the data showed limited consistency of trends.

This thesis reveals the current communication strategies within historic preservation nonprofits through a survey and selective interviews. It outlines how an audience targeting communication approach can be useful for driving engagement, the lifeblood of a nonprofit. Chapter Two reviews and analyzes current literature in the arenas of advertising techniques, nonprofit communication methods, and historic preservation goal setting. Chapter Three explains the methodology used to address the thesis research questions. It discusses the survey and interview objectives, design, and distribution and also details the rationale for organizations included in the survey.

Chapter Four reviews the collected survey data, including illustrated figures, key themes, and correlations. Trends amongst the respondent data are intertwined with added feedback from follow-up interviews with participating respondents. Chapter Five discusses broader conclusions from the survey, including how the gathered information can inform future efforts by preservation nonprofits. Recommendations for future research are included based on the findings.

CHAPTER TWO: LITERATURE REVIEW

Communication in mission driven historic preservation organizations is increasingly important; however, this topic has received modest scholarly attention. This chapter provides an overview of communication, exploring how and why it is used by both public companies and nonprofit organizations. The literature examined starts with a broad perspective and then narrows to a selection of nonprofit communication methods. Research of other nonprofit disciplines includes health care, arts & culture, and educational organizations to help provide context of how other fields are determining communication strategies based on specific areas of interest. Next, a closer examination of communication for historic preservation nonprofits is reviewed, resulting in the observation that there is a gap in data-driven research of current communication trends within historic preservation nonprofits.

Broad Analysis of Communication

Communication as a practice is the way in which information is shared, which includes verbal, written and nonverbal forms. An important consideration in communication is a consistent tone and a clear message. Communication at a company includes both internal and external efforts, with specific objectives, strategies, and methodologies tailored to the audience.¹² Communication focuses on the methods of engaging with customers and stakeholders while telling the overall story of the goals.¹³

¹² Indeed, “The Importance of Business Communication: 6 Reasons Why | Indeed.Com.”

¹³ Julie Pierson-Fields, “The Difference Between Marketing and Communications.” LinkedIn, August 1, 2021, <https://www.linkedin.com/pulse/difference-between-marketing-communications-julie-pierson-fields/>.

Communication and marketing are two different facets of a business plan, and they are both used to drive awareness. Marketing is product and client centered, focusing on driving home what a brand offers for the consumer, with the end goal of a conversion such as a purchase of a product or service.¹⁴ Marketing is focused on the strategies employed to reach customers. The traditional marketing strategy uses a marketing mix that includes the “four Ps” – product, pricing, place, and promotion.¹⁵ The first instance a consumer is exposed to a brand is often through a marketing effort, therefore it is important to make a good first impression.¹⁶

Communication strategies maintain a relationship with a consumer to continue to build engagement and loyalty.¹⁷ Communication within an organization involves identifying audiences, choosing the modes of outreach, and developing a plan for information sharing. Compared to marketing, communication includes both the consumer as well as internal stakeholders, such as a board of trustees. Communication helps build the brand of a company through a cohesive message and approach. For both marketing and communications, there is no one size fits all approach. These practices need to be tailored specifically to meet the needs and goals.¹⁸ Both marketing and communications are important for for-profit and nonprofit organizations.

¹⁴ Pierson-Fields, “The Difference Between Marketing and Communications.”

¹⁵ Ed Green, “Marketing vs. Communications: What’s the Difference and Why Should I Care?” C2 Strategic Communications, February 24, 2016, <https://c2strategic.com/marketing-vs-communications-whats-the-difference-and-why-should-i-care/>.

¹⁶ Pierson-Fields, “The Difference Between Marketing and Communications.”

¹⁷ Pierson-Fields, “The Difference Between Marketing and Communications.”

¹⁸ Ed Green, “Marketing vs. Communications: What’s the Difference and Why Should I Care?”

Nonprofit organizations and for-profit companies have similarities and differences in their practices. Communication in the for-profit space is largely concerned with marketing, contrasting with nonprofits in which there is little emphasis on paid advertising partially due to budget, resource, expertise, and time constraints. Additional nuances detailing differences between for-profit and nonprofit communication will be discussed throughout this chapter to show the challenges faced.

For-Profit Communication

History and Goals

Communication and marketing programs became a consistent component of business practices in the 1950s, but communication as a practice has always existed. Historic records of trade and commerce show details of price, availability, and distribution of products, which communicated to people what businesses had to offer.¹⁹ Marketing, as a general business strategy, emphasizes target audiences, meaning who the company would like to influence to use services or purchase goods.²⁰ Early twentieth century marketing focused on product or services with the emergence of customer demand. During the Great Depression, sales promotions were increasingly important and competition amongst businesses increased, therefore marketing's purpose was to convince people to purchase a good or service. In the 1950s, companies started to focus more on the attributes of the customer to reach the right person in the right place at the right time.²¹ Market segmentation has been a cornerstone of marketing since, to engage

¹⁹ Mary Tschirhart and Wolfgang Bielefeld, *Managing Nonprofit Organization* (San Francisco: Jossey-Bass, 2012), 169, <https://ebookcentral.proquest.com/lib/clemson/reader.action?docID=836561&ppg=8>.

²⁰ Tschirhart and Bielefeld, *Managing Nonprofit Organizations*, 172.

²¹ Tschirhart and Bielefeld, *Managing Nonprofit Organizations*, 170.

consumers thought their day. The evolution of technology and consumption habits has made this philosophy more important.

The American Marketing Association defines marketing as “the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large.”²²

Marketing is a crucial component for for-profit companies to understand consumer needs and generate revenue. The goal of marketing is to align a specific customer with the appropriate product or service. Marketing identifies how to communicate the value of the product for the customer.²³ Marketing provides the opportunity to learn about customers through data-driven analytics and audience research to determine if brands are resonating with customers. This can include an analysis of website traffic, sales information, and brick-and-mortar visitation data tied to marketing campaigns to help inform future products or marketing initiatives. Audience research can help brands better understand their customers and their needs in relation to what the company has to offer.

Platforms

Media consumption patterns change parallel to how consumers use media to obtain research and review various types of information. Attention is perpetually divided; people often actively seek out information versus the historic passive approach of receiving brand messages. New forms of communication present more opportunities for

²² “What Is Marketing? - The Definition of Marketing,” American Marketing Association,” accessed January 20, 2024, <https://www.ama.org/the-definition-of-marketing-what-is-marketing/>.

²³ Denise Lee Yohn, “Marketing Matters Now More Than Ever,” Forbes, January 8, 2019. <https://www.forbes.com/sites/deniselyohn/2019/01/08/marketing-matters-now-more-than-ever/>.

personality of content, timing, and location.²⁴ Advancements of new technology in media consumption habits creates a fragmented market with a variety of ways to try to reach the same end user.²⁵ Media fragmentation has arisen due to the increase in the number of ways in which consumers are receiving information; as soon as a new technology emerges, it creates another opportunity to message a user. However, new media vehicles must compete for the attention of the consumer, resulting in a challenge for communicators to efficiently reach their target audience. Fragmentation can be beneficial to the consumer with more content to consume, however this creates challenges for brands to create cohesive messaging strategies, especially with limited budgets.²⁶ While time spent consuming media has remained relatively constant, the consumption of media is spread out over more mediums, and thus the media budget is also spread across many platforms. This potentially impacts the frequency with which potential consumers see the message.²⁷

Media fragmentation has provided the opportunity for brands to deploy a reactive and real time approach to the ways to disseminate different messages on specific platforms. Targeting consumers across a variety of touch points, such as digital, print, television, and radio, to speak to them a specific number of times, more than likely results

²⁴ Rajeev Batra and Kevin Lane Keller, "Integrating Marketing Communications: New Findings, New Lessons, and New Ideas," *Journal of Marketing* 80, no. 6 (2016): 122. <https://www.jstor.org/stable/44134976>.

²⁵ Karen Nelson-Field and Erica Riebe, "The Impact of Media Fragmentation on Audience Targeting: An Empirical Generalisation Approach," *Journal of Marketing Communications* 17 no. 1 (2011): 51, doi:10.1080/13527266.2010.484573.

²⁶ Nelson-Field and Riebe, "The Impact of Media Fragmentation on Audience Targeting," 52.

²⁷ Nelson-Field and Riebe, "The Impact of Media Fragmentation on Audience Targeting."

in a purchase of the good or service.²⁸ Communication methods should build upon each prior instance of consumer exposure. Brands need to assess how they are reaching people with sequential messaging.²⁹ Conducting a frequency analysis would help determine the ideal number of exposures to a message in order to result in a conversion or action.

Audiences

In “Integrating Marketing Communications: New Findings, New Lessons, and New Ideas,” Rajeev Batra and Kevin Lane Keller posit integrated marketing campaigns can be aided by the use of a conceptual framework to analyze consumers' most needed information and match the media and message to meet each need. Understanding an audience is key to achieving the goals of the company to meet the needs, attitudes, and consumption habits. Research is crucial to identify potential segments and develop characteristics in relation to the company strategy. If multiple groups are identified, specific products, promotions, prices, and distribution should be developed to cater to the different needs.³⁰

Historically, marketers have segmented their audiences by age, sex, income, stage of life or geography, but there has been a growing trend to group consumers into cohorts instead. Charles D. Schewe and Stephanie M. Noble explored this concept in their journal article “Marketing Segmentation by Cohorts: The Value and Validity of Cohorts in America and Abroad”. Cohorts are a grouping of people who experience similar significant life events that would shape their points of view. Cohorts are formed by

²⁸ Batra and Keller, “Integrating Marketing Communications,” 122.

²⁹ Batra and Keller, “Integrating Marketing Communications,” 123.

³⁰ Tschirhart and Bielefeld, *Managing Nonprofit Organizations*, 172.

external events during formative years, differentiating the segmentation method from generational groups as people within the same generation may not have experienced the same events. For example, those who lived during the Depression experienced similar economic hardship and developed specific behaviors as a result. Studies have shown that cohorts share common values, attitudes, beliefs, and behaviors.³¹ Gender and race also play a role in the collective memory of the cohort, as these groups tend to have varying interests in cultural and political events.³²

Nonprofit Communication

Goals

Approximately one and a half million nonprofit organizations were registered with the Internal Revenue Service (IRS) in the United States as of 2016.³³ As the number of nonprofits increases, so does the need to differentiate and clearly convey goals. Most nonprofits are small institutions with limited resources. Public support rests on awareness of the organization and relative importance to society. Similar to for-profit companies, creating an ongoing relationship with all constituent groups is key for nonprofit organizations, but for different outcomes such as recruitment, fundraising, ticket sales,

³¹ Schewe and Noble, "Market Segmentation by Cohorts: The Value and Validity of Cohorts in America and Abroad," 130.

³² Schewe and Noble, "Market Segmentation by Cohorts: The Value and Validity of Cohorts in America and Abroad," 132.

³³ "Number of non-profit organizations in the U.S. from 1998 to 2016 (in millions)," Statista, Accessed October 27, 2023. <https://www.statista.com/statistics/189245/number-of-non-profit-organizations-in-the-united-states-since-1998/>

volunteers, and membership.³⁴ Communicating clearly and consistently can advance a nonprofit mission and help build a public reputation through repetition.³⁵

Establishing a competitive advantage and point of differentiation is one of the most important considerations in conveying the purpose of the enterprise, especially since there are an abundance of nonprofits. The communication efforts should discuss the foundation's unique aspects, even if other groups conduct similar work.³⁶

Increased government funding has made nonprofit organization management more professional and increasingly similar to for-profit corporations.³⁷ Mary Tschirhart and Wolfgang Bielefeld published a comprehensive book *Managing Nonprofit Organizations* that provides insights into the marketing and communication strategies of nonprofits. They posit that marketing starts with the mission and strategies of the organization to connect to those that benefit from or are influenced by the goals.

Marketing as a business practice evolved during the twentieth century to offer applications for nonprofit foundations. For-profit methods made their way into charity groups starting in the 1960s. Philip Kotler and his colleagues led this charge by publishing articles to show how concepts in the for-profit world could translate to nonprofits.³⁸ Similar to for-profit companies, marketing in the nonprofit sector should

³⁴ Heyman, *Nonprofit Management 101: A Complete and Practical Guide for Leaders and Professionals*, 410.

³⁵ Heyman, *Nonprofit Management 101: A Complete and Practical Guide for Leaders and Professionals*, 425.

³⁶ Heyman, *Nonprofit Management 101: A Complete and Practical Guide for Leaders and Professionals*, 411-412.

³⁷ Joanne G. Carman "Understanding Evaluation in Nonprofit Organizations." *Public Performance & Management Review* 34, no. 3 (March 2011): 351. <http://www.jstor.org/stable/41104065>.

³⁸ Tschirhart and Bielefeld, *Managing Nonprofit Organizations*, 170.

include a marketing mix to achieve the goals of both the advertising campaign as well as the organization. A marketing mix includes product, promotion, price, and place and can be combined in various ways to achieve these targets.³⁹

Walter Wymer and Sandra Mottner's article "Marketing Inclusion in the Curricula of U.S. Nonprofit Management Programs" surveyed program directors to research whether marketing education is integrated into United States nonprofit management programs. Their research found limited emphasis on marketing education in management programs, with, on average, about one course focused on the area of study. Wymer and Mottner also found that the program directors did not place as much emphasis on marketing compared to the other core subjects taught in the programs. Research showed that tapping into practicing professionals, especially those working at nonprofits, to teach classes would be beneficial to the students and should also provide guidance on the curriculum development for the programs.⁴⁰ There appears to be limited formal education of specific nonprofit communication techniques either through accredited programs, formal workshops, or widely available online resources.

Comparison to For-Profit Companies

Nonprofits have multiple objectives to achieve. The primary objectives are often nonfinancial in nature compared to for-profit businesses. This makes developing a communication and measurement plan difficult without a specific quantitative goal.

³⁹ Tschirhart and Bielefeld, *Managing Nonprofit Organizations*, 169-71.

⁴⁰ Walter Wymer and Sandra Mottner, "Marketing Inclusion in the Curricula of U.S. Nonprofit Management Programs," *Journal of Public Affairs Education* 15, no. 2 (Spring 2009): 185-202, <http://www.jstor.org/stable/40215849>.

Nonprofits often provide services or a social impact as opposed to tangible goods or services, ultimately influencing the approach to marketing.⁴¹

Developing and implementing a marketing plan involves analyzing the situation, establishing goals, determining audiences, identifying strategies, brainstorming, prioritizing budgets, and establishing metrics for success.⁴² Similar to an integrated marketing plan in the for-profit space, developing a plan for communications within a nonprofit will help drive results toward desired outcomes within the budget allocated. A marketing plan outlines who a business is trying to target, what the brand wants them to do, how to reach them, and how to determine success.⁴³

A challenge for both nonprofit and for-profit companies is establishing the appropriate budget to support the needs of a communications approach. Both nonprofit and for-profit organizations can develop a marketing plan and segment their ideal audiences, but budget limitations can reduce activating communication tactics, and thus curtail achieving the overall objectives. To start, an organization should pursue the tactics that are the most cost effective but provide the greatest benefit.⁴⁴ Nonprofits do not always have a specific budget carved out to support communications, and therefore must find creative ways to fund their efforts. Often, nonprofits do not have a sufficient budget

⁴¹ Tschirhart and Bielefeld, *Managing Nonprofit Organizations*, 171.

⁴² Heyman, *Nonprofit Management 101: A Complete and Practical Guide for Leaders and Professionals*, 411.

⁴³ Heyman, *Nonprofit Management 101: A Complete and Practical Guide for Leaders and Professionals*, 414.

⁴⁴ Heyman, *Nonprofit Management 101: A Complete and Practical Guide for Leaders and Professionals*, 422

to support dedicated communication staff, often relying on various parts of the organization to develop the communication strategy on a part-time approach.

Audiences

As discussed above with for-profit firms, segmenting audiences into key target groups provides a nonprofit the opportunity to use the limited resources available as effectively as possible.⁴⁵ Nonprofits tend to have multiple target constituents, such as those who donate time or money and/or those who benefit from the organization's services. These audiences likely have different characteristics, but should be taken into consideration when developing a business plan.⁴⁶ Market segmentation should be used to identify groups of potential consumers based on commonalities, including objective and psychological factors, often broken down by demographics, geographical, and psychographic criteria. The audiences created should align with the mission of the foundation and be large enough in scale to make the effort worthwhile.⁴⁷ Identifying the type of people who are likely to care about the causes helps determine how to reach the target. An organization needs to identify those who are most likely to take an action or engage and serve them with appropriate messages.⁴⁸

Tschirhart and Bielefeld highlight that many nonprofits must garner approval from the board, staff, volunteers, and an engaged community, who may prove difficult to convince to spend money on promotional strategies compared to other intentions of the

⁴⁵ Tschirhart and Bielefeld, *Managing Nonprofit Organizations*, 182-84.

⁴⁶ Tschirhart and Bielefeld, *Managing Nonprofit Organizations*, 171.

⁴⁷ Tschirhart and Bielefeld, *Managing Nonprofit Organizations*, 182-84.

⁴⁸ Heyman, *Nonprofit Management 101: A Complete and Practical Guide for Leaders and Professionals*, 413.

organization.⁴⁹ Since nonprofits receive tax exemption status, they can be under the purview of the public and increased attention on how funds are spent. Therefore, they should be conscious of how they are perceived by the public and how their advertising strategies could impact that.⁵⁰

Measuring Effectiveness

Measuring effectiveness is important to determine if communication tactics have been and will continue to be effective. Establishing specific measurement metrics can help make informed decisions about the effectiveness of the efforts and help plan future campaigns. Marketing and communication strategies should be reviewed annually and updated regularly based on the real time data available.⁵¹

Joanne G Carmen's "Understanding Evaluation in Nonprofit Organizations" analyzes how nonprofits conduct evaluations to determine if they are meeting the goals of their mission to help identify strategies that would help them use evaluations more meaningfully.⁵² Carmen conducted interviews with executives from thirty-one nonprofit organizations, ranging in size, location, and associations. Most of the respondents reported they conduct agency evaluations for monitoring purposes and do not necessarily capitalize on the benefits the evaluation could provide. They use the information to report out on numbers, not to make changes. Evaluations were conducted due to institutional pressures instead of as a resource for development purposes.⁵³ While the study was not

⁴⁹ Tschirhart and Bielefeld, *Managing Nonprofit Organizations*, 171.

⁵⁰ Tschirhart and Bielefeld, *Managing Nonprofit Organizations*, 172

⁵¹ Heyman, *Nonprofit Management 101: A Complete and Practical Guide for Leaders and Professionals*, 423

⁵² Carman, "Understanding Evaluation in Nonprofit Organizations," 351.

⁵³ Carman, "Understanding Evaluation in Nonprofit Organizations," 365.

specific to communication, it shows that historically the majority of nonprofits have not been implementing a strategy for evaluation and potential pivot.

Communication Case Studies in Selective Nonprofit Fields

To understand the value and importance of communications within nonprofits, it is crucial to assess how a variety of fields approach tactics and deploy messaging. The landscape is dynamic, therefore, examining industry thought leaders can provide valuable insights applicable to other nonprofit sectors, including historic preservation.

Health Care

Mission

In 2008, a panel discussion between four marketing professionals in the nonprofit health sector highlighted advertising within nonprofit health care organizations. The panelists included Anthony Cirillo, a principal at Fast Forward Strategic Planning and Marketing Consulting, Jeffrey Cowart, the chief marketing officer at Inova Health System, John Kaegi, group vice president of marketing at BlueCross BlueShield of Florida, and Geoffrey Taylor, senior vice president of communications at Excellus BlueCross BlueShield, Rochester. The discussion was moderated by Bruce McPherson, the president and CEO of the Alliance for Advancing Nonprofit Health Care. While the focus of the discussion was on advertising, the concepts discussed play a role in communications in general as well.

Communication Goals

Building awareness is one of the key goals across health care, within both the for-profit and nonprofit realms. As a result, communication is not only the responsibility of

the marketing department. Hospitals for example, rely on many constituents for the perceptions of their branding; most hospitals spend the majority of their advertising budgets on branding as opposed to public education or building relationships. A different panelist noted there is a lot of competition in health care compared to hospitals, which has resulted in aggressive promotion of specific products. Competition is much more prevalent in the health care space because many providers are offering similar products or services. Overall, building loyalty is the most important consideration for health care as a whole.⁵⁴

When asked if advertising the nonprofit status of an institution to the public benefits the communication efforts, the panelists noted the public does not care about a company's tax exemption status; consumers want to know if they are getting their needs met by the organization. Sharing the good work that is being done through community programming and events is a more important consideration. An observation is that nonprofits need to focus more on public education compared to for-profits and therefore should dedicate their communication toward education.⁵⁵

Communication Strategies

A focus of health care is to build loyalty; therefore, it is important to include face to face interactions within marketing as that impacts a visitor's loyalty to a hospital.

These interactions must match how the provider is branding themselves to the public as

⁵⁴ Anthony Cirillo, Jeffrey Cowart, John Kaegi, Geoffrey Taylor, and Bruce McPherson, "Advertising by Nonprofit Health Care Organizations," *Inquiry* 45, no. 3 (Fall 2008): 257. <http://www.jstor.org/stable/29773374>.

⁵⁵ Cirillo, Cowart, Kaegi, Taylor, and McPherson. "Advertising by Nonprofit Health Care Organizations," 260.

well as to ensure repeat visitation in such a competitive environment.⁵⁶ The moderator inquired about competition within health care affecting advertising decisions. The panelists stated that with increased competition, there is increased advertising, but it is important to have an always on approach to present consistent branding. Specifically in the area of nonprofit health care, more advertising around public education is possible compared to other disciplines as a way to direct the message in the places it will make the greatest impact. Compared to for-profits, these might not be the parts of the organization that are profit making, but instead are making an impact on the community. In for-profit health care, communication is much more product or promotional focused.⁵⁷

Haran Ratna's journal article "Importance of Effective Communication in Healthcare Practice" stresses methods of assessment for communications should be integrated into the health care systems as a double check. Without testing the effect of communication in a practical environment, it opens up the possibility for additional inefficiencies. Additionally, assessment methods should be standardized in order to provide points of comparison to "ensure comprehensive and effective communications". Ratna notes simple measurement practices should be put in place for evaluation as assessments of communication can be time-sensitive, especially in the busy field of health care.⁵⁸

⁵⁶ Cirillo, Cowart, Kaegi, Taylor, and McPherson. "Advertising by Nonprofit Health Care Organizations," 257.

⁵⁷ Cirillo, Cowart, Kaegi, Taylor, and McPherson, "Advertising by Nonprofit Health Care Organizations," 257-258.

⁵⁸ Haran Ratna, "The Importance of Effective Communication in Healthcare Practice," *Harvard Public Health Review* 23 (Fall 2019): 1–6. <https://www.jstor.org/stable/48546767>.

Takeaways

Due to the shift to more consumer direct health care, where patients are the key audience instead of doctors, marketing strategies have had to adjust. There has been a shift to a broader communications approach to include on-site experiences, online presence, and traditional advertising methods. Strategies have been tailored to more focused channels with stronger messages to specific audiences. In some areas, foundations have also been working with local groups, incorporating face-to-face correspondence, an important consideration for charities.⁵⁹

While health care and historic preservation have different goals and offerings to the public, the nuances of health care advertising as a means to understand nonprofit communication could assist historic preservation organizations to consider other methods. One of the biggest takeaways is making sure the organization is sharing their purpose and goals with the community and how the public can benefit from the work of the nonprofit; this can be an important consideration for communication. It is also important to ensure customers and the public are satisfied with the work an establishment is conducting and if they are meeting the expectations conveyed through advertising.

Food Waste

Mission

In 2012, the Natural Resources Defense Council (NRDC) published a report on how to encourage farmers to reduce their use of water, gas, fertilizer, and pesticides in the

⁵⁹ Cirillo, Cowart, Kaegi, Taylor, and McPherson. "Advertising by Nonprofit Health Care Organizations," 258.

food they produced. At the time, the NRDC was focused on policy and science; there was no emphasis on communicating findings to the public. However, when the report was completed, the organization was in transition to improve their communication of important work conducted.⁶⁰

Communication Goals

Historically, the NRDC used the press to release findings of scientific research but in this new phase of the organization, the communication department partnered with the researchers to find new ways to garner public interest. The NRDC wanted to highlight the important findings in this research to honor the time and effort by the researchers. The report conclusion included helpful statistics about food waste in the United States. Readers would have to make it to the end of this sixty-nine-page document to discover this information.⁶¹ It is likely that prior to the incorporation of communications in the development of their research goals, NRDC had many reports that had helpful information that was hidden in the text and not highlighted for public knowledge.

Communication Strategy

The report was rewritten to include the key facts at the beginning to both inform the public, but also increase readership to frame the report. The data was made clear and adjusted to tell a story to the reader. Additionally, visuals added to the report illustrated food waste at all stages of the food chain to connect with audiences in a more personal way.

⁶⁰ Lisa Benenson, “The Power of Simple.” *Stanford Social Innovation Review*, 2016. <https://doi.org/10.48558/Z6N8-MQ62>.

⁶¹ Benenson, “The Power of Simple.”

The NRDC wanted to reach audiences that may have never heard of the organization or the issues they research. In order to do so, they segmented key audiences to target with this report through a press release including food blogs, lifestyle websites, and environmental reporters. The increase in public awareness of both the topic of food waste, as well as the NRDC as an organization, also assisted the company's policy advocate resources for policy change on a grander scale.⁶²

The new version of NRDC's report was well received with increased coverage through news sources as well as blog posts about the food waste issues facing the United States. The report was the most successful one the NRDC had published and ultimately created change in the Country as Congress introduced legislation to increase food that can be donated that would otherwise have been discarded.⁶³

Takeaways

Including communication at all phases of a project proved to be effective as seen by updating the organization of the report, changing the title, including visuals, reevaluating the purpose, and targeting new audiences. Reducing the amount of technical and scientific jargon in both the report and the communication made the information more accessible to the public, which increased the reach of the data. For the NRDC, including solutions-oriented information for public facing content proved more effective compared to instances where just scientific research was published. This provided actionable insights for the target audience. The desire to reach new audiences with the

⁶² Benenson, "The Power of Simple."

⁶³ Benenson, "The Power of Simple."

content produced resulted in the need to change communication methods to match the consumption habits of the desired target.

Arts & Culture

Mission

Bonita Kolb's book *Marketing for Cultural Organizations* provides insight into the approaches nonprofit art and cultural associations should consider when developing their marketing strategy, with a focus on reaching new consumers. Kolb notes that in order for art institutes to continue to exist, they need to adapt to new environments and compete for audiences. As a result of decreasing subsidies due to government cutbacks, cultural organizations have had to become more sophisticated in their approaches to promotion to facilitate attendance at art exhibits. Kolb notes that the way in which people consume cultural products has resulted in a decline in attendance.⁶⁴

Communication Goals

Kolb critiques the common misunderstanding within cultural arts organizations: marketing convinces people to buy something they do not need.⁶⁵ Her research has indicated that some managers still do not understand how communication can be used as a tool to convey a mission but were instead focused on promoting subscription sales. Cultural arts organizations' primary objective has been to reach a middle-class person and encourage them to attend cultural events and drive loyalty to then attend other programming.⁶⁶ In the 1970s, cultural organizations researched the demographics of

⁶⁴ Bonita M. Kolb, *Marketing for Cultural Organizations: New Strategies for Attracting Audiences*. (New York: Taylor & Francis Group, 2013). ProQuest Ebook Central, 53.

⁶⁵ Kolb, *Marketing for Cultural Organizations*, 53.

⁶⁶ Kolb, *Marketing for Cultural Organizations*, 57.

those attending events to attract similar audiences; however, limited research was conducted on why people attended. This limitation in the research resulted in one-dimensional visitation, mostly well-educated, high-income, white people, which did not align with the missions of being more inclusive. In the 1980s, there was a boom in the volume of arts programs, all vying for the same type of person to attend, creating a competitive marketing place with limited differentiation. The 1990s featured more experimentation to attract a broader range of attendees by reducing the cost of tickets, offering discounts for students and seniors, and developing outreach programs. The early 2000s became a time to reevaluate missions to serve the public and adjust to the changing technological advancements. As with other nonprofits, cultural organizations lagged behind for-profits when adopting strategies, potentially as a result of funding sources and mindsets.⁶⁷

Communication Strategies

Kolb notes that groups must consider factors, both internal and external, that might affect plans before making any sweeping changes amongst creative thinkers.⁶⁸ For a customer-driven approach (compared to a production or sales approach), the needs of the customer must be considered first, while also balancing the capabilities of the group. Another roadblock common for cultural organizations is the mindset that marketing is not the best use of the limited funds available.⁶⁹

⁶⁷ Kolb, *Marketing for Cultural Organizations*, 56-58.

⁶⁸ Kolb, *Marketing for Cultural Organizations*, 61.

⁶⁹ Kolb, *Marketing for Cultural Organizations*, 63.

Kolb recommends a few ways in which effective research can be conducted including competitive, motivation, satisfaction, and promotion research. Looking at existing research for information collected is another way to understand how and what should be communicated.⁷⁰

Takeaways

Researching the consumer and understanding the audience is a key consideration for cultural organizations based on how they have historically approached audience development. Understanding a visitor's wants, needs, and why they are attending these types of venues is more important than their demographic information. Causes people care about and their interests are more likely to result in engagement rather than net worth, race, or education level. Similar to art organizations, research and data into audiences with communications as is impactful for historic preservation nonprofits. Measuring communication effectiveness is vital for future efforts to determine how audiences are reacting to the nonprofit as a whole as well as specific communications. These learning opportunities can help inform future goals.

Unlike arts and cultural organizations, historic preservation nonprofits generally understand the importance of parsing out communications across several messages such as branding/awareness, donations, ticket sales, and/or public engagement. Arts organizations appear to focus on specific instances for ticket sales or promotion of a one-off event, but preservation nonprofits communicate an array of issues to their constituents. Often measurement of communications takes a backseat.

⁷⁰ Kolb, *Marketing for Cultural Organizations*, 98.

Historic Preservation Communication

Early History

Exploring historic preservation through a historical lens, one can see that the same issues of mission, audience, and communication strategies were in focus. The first two instances of preservation in the United States are important considerations pertaining to communication. Grassroots preservation efforts and the start of the modern preservation movement started with the Mount Vernon Ladies Association (MVLA) in 1853, which was the first national preservation society in the United States. Ann Pamela Cunningham led a group that wanted to turn a dilapidated plantation into a hotel catering to the rich. During this time, women prioritized their household, and it was where they felt they could make the biggest impact. As such, the women wanted to protect houses and the history of established buildings.⁷¹ Cunningham's target audience to garner funds to purchase the building were other wealthy women from both the North and South. Cunningham wanted to communicate that even women of differing political opinions could band together to protect a national cultural resource.⁷² To disseminate her thoughts on the issues, Cunningham wrote articles in newspapers and magazines, including the *Charleston Mercury*. She rallied at public meetings, providing leadership on issues she cared about and demonstrated the key contributions of women to public life. The MVLA purchased George Washington's Mount Vernon in 1858 and have continued campaigning

⁷¹ Randall Mason, and Max Page. *Giving Preservation a History: Histories of Historic Preservation in the United States*. (New York: Routledge, 2020), 44.

⁷² Stephanie Meeks and Kevin C. Murphy. *The Past and Future City: How Historic Preservation Is Reviving America's Communities* (Washington D.C.: Island Press, 2016), 135-137.

for preservation ever since.⁷³ Cunningham used her powerful voice within the press and in person interactions to communicate preservation needs.

While not as successful as the Mount Vernon's Ladies Association, efforts to save New York's Pennsylvania Station in 1963 garnered a lot of attention and interest as a result of vocal neighborhood advocates and New Yorkers. The proposed and eventual demolition of Pennsylvania Station is a key marker in the history of the preservation movement in New York City. On August 2, 1962, a group of locals, architects, artists, and critics were in front of Pennsylvania Station to protest the demolition of an iconic and historic structure. The Pennsylvania Railroad sold their air rights to raise money during a decline in railroad travel. Their plan was to build a smaller station below street level and build Madison Square Garden above; the Railroad was to profit off the funds generated from Madison Square Garden. The Action Group for Better Architecture in New York (AGBANY) was formed by architects to protest this development and destruction.⁷⁴ Much of the publicity for the movement to save Pennsylvania Station was through the press. This included advertising for rallies, coverage of events, and the signing of public letters to oppose the demolition by Jane Jacobs and other New Yorkers. The goal of these efforts was to gain additional public support, but more importantly recognition by New York City to stop the demolition of the iconic building.⁷⁵

⁷³ Randall Mason, and Max Page. *Giving Preservation a History*, 44.

⁷⁴ Sheryl, "Remembering the Former Pennsylvania Station," Village Preservation - Greenwich Village Society for Historic Preservation, August 9, 2022, <https://www.villagepreservation.org/2012/08/02/remembering-the-former-pennsylvania-station/>.

⁷⁵ David W. Dunlap, "50 Years Ago, Sharply Dressed Protesters Stood Up for a Train Station They Revered," *New York Times*, July 31, 2012. <https://archive.nytimes.com/cityroom.blogs.nytimes.com/2012/07/31/50-years-ago-sharply-dressed-protesters-stood-up-for-a-train-station-they-revered/?ref=nyregion>.

Pennsylvania Station was demolished starting in October 1963. Despite this defeat, Pennsylvania Station became a symbol for future preservation movements and generated discussions concerning preservation professionals. While the communication efforts did not save the structure, it spurred additional support for preservation within New York City. The New York City Landmarks Commission was created, and a new Landmarks Law was put into place to combat future instances of the destruction of iconic structures.⁷⁶

Preservation in New York City differed from the MVLA in that preservation in New York was led by city builders and reformers using both private and public resources to transform the urban landscape. Those that were changing the landscape of architecture in the city, were also the ones campaigning to save historic buildings.⁷⁷ Efforts in New York focused on buildings, historic sites, statues, plaques, parks, and open spaces. The rallies to save Pennsylvania Station birthed a new generation of preservationists to save the built environment.⁷⁸

Contemporary Research of Historic Preservation Communication

In 2017, the Advisory Council for Historic Preservation (ACHP) reviewed the National Historic Preservation Act (NHPA) federal preservation program and identified twelve goals to improve the program to address the growing needs of preservation. A few of the main recommendations centered on communication. Maintaining and strengthening public support was one of the recommendations proposed. To continue to

⁷⁶ Meeks and Murphy. *The Past and Future City*, 38-41.

⁷⁷ Randall Mason, and Max Page. *Giving Preservation a History*, 68.

⁷⁸ Randall Mason, and Max Page. *Giving Preservation a History*, 69.

thrive, organizations must attract a diverse population of constituents to gain broad public support and funding for preservation. Highlighting preservation as a tool for vibrant neighborhoods and promoting tourism often aids in garnering additional support for community groups as they offer the opportunity to share success stories. Showing the long-term impact of preservation can aid in drumming up future interest. Clearly communicating the social, economic, and environmental benefits of preservation are imperative as well as education about historic places.⁷⁹

A second recommendation by the ACHP was to expand and encourage public engagement. Involving the community in prioritizing the preservation efforts is key to garner increased public support. Technology and social media can be useful tools to engage the public. Including underrepresented communities in the efforts to develop strategies and techniques to engage should be considered as well, to ensure all points of view are taken into account.⁸⁰

The National Trust for Historic Preservation published a report on *Effective Communication for Preservation Nonprofit Organizations* in 2003 that outlined high level strategies to consider for the field as a whole. The recommendations and strategies outlined in this report tie back to the general goals of communication, not necessarily specific to nonprofits or preservation groups.

The first of three steps for effective communication is to prioritize efforts. This should ensure the goals align with the approaches to prioritize who is reached to manage

⁷⁹ Advisory Council on Historic Preservation, “The National Historic Preservation Program at 50,” 8.

⁸⁰ Advisory Council on Historic Preservation, “The National Historic Preservation Program at 50,” 18-19.

resources, including time and money. The second is to develop a consistent and focused message relevant to the target audiences. When trying to connect with people not in the field, a clear and concise message is required and should include how their support will benefit them and the community. The third is to deliver a consistent message across all methods of communication with both the general public and the media.⁸¹ The National Trust proposes using more traditional modes, including the media.⁸² The press offers the unique ability to generate interest for a cause at no cost, which is important when funds are limited but interest in the issue is significant. Relationships with the media will help ensure consistent coverage of efforts, with more coverage and in a positive light if relationships are upheld.⁸³

In 2023, the National Alliance of Preservation Commissions (NAPC) published the “Messaging Guide for Local Preservation Programs” geared toward local government preservation programs. The resource was created for local historic preservation commissions such as design review boards, landmarks boards, cultural heritage commissions, and those who work with local historic preservation commissions. The “Messaging Guide” assists people and organizations in cities, towns, or smaller communities, rather than the state or national level. The goal of this document is to be a

⁸¹ Richard McPherson, Debra Ashmore, and Timothy Oleary, *Effective Communications for Preservation Nonprofit Organizations* (Washington, D.C.: National Trust for Historic Preservation, 2003), 1.

⁸² McPherson, Ashmore, and Oleary, *Effective Communications for Preservation Nonprofit Organizations*.

⁸³ McPherson, Ashmore, and Oleary, *Effective Communications for Preservation Nonprofit Organizations*, 2.

helpful and customizable resource, even encouraging users to copy and paste elements for their own efforts.⁸⁴

The NAPC guide is meant to help improve communities through preservation, specifically focusing on basic messages and tips for local programs.⁸⁵ A few examples of advice provided in the guide include the following: (i) communication tips focused on making information easy to use; (ii) advice on how to connect with different audiences; and (iii) how to communicate what historic preservation is and why preservation matters to community members.⁸⁶

Conclusion

Communication in for-profits and nonprofits often have similar goals and audience approaches, but they have different execution challenges. Mission-driven groups need to ensure their communication strategies align with their overall organizational goals, whereas for-profit companies primarily aim to sell a good or service. Across nonprofit disciplines, effective communication programs are key for advocacy, fundraising, and education, which can result in changing public policy, shaping debate on issues, and generating public support.⁸⁷ Communications include in-person, social media, print publications, and programs. Tailored audience targeting can be applied to both nonprofit and for-profit, as reaching the right person at the right time is imperative for engagement.

⁸⁴ National Alliance of Preservation Commissions, “Messaging Guide for Local Preservation Programs,” 2023, 6, <https://www.napcommissions.org/messaging-guide>.

⁸⁵ National Alliance of Preservation Commissions, “Messaging Guide for Local Preservation Programs,” 8.

⁸⁶ National Alliance of Preservation Commissions, “Messaging Guide for Local Preservation Programs.”

⁸⁷ McPherson, Ashmore, and Oleary, *Effective Communications for Preservation Nonprofit Organizations*, 1.

Historic preservation is a young discipline and often lacks critical analysis, especially surrounding communication. Outreach is included in the history of preservation, but the current methods and trends that are used have not been analyzed in depth. There are existing resources available to support historic preservation communication leaders; however, the materials lack a study of the current landscape to determine if there are trends. Additionally, the development of case studies for future preservationists would be helpful as a resource. The research conducted in this thesis will assist practitioners in understanding the current state of communication and consider methods of improvement based on the experience of professionals. In the next chapter, the methods used in this thesis to research current efforts by historic preservation nonprofits will be outlined.

CHAPTER THREE: METHODOLOGY

The goal of this research is to identify current communication methods, evaluate measurements of effectiveness, and assess trends across historic preservation nonprofits on the East Coast to determine current practices and provide resources for future communication efforts. The methodology employed collected data on organizations, the personnel responsible for communication, and their current communication strategies.

The method of data collection featured a two-stage approach, utilizing both a survey and follow-up interviews. A digital survey was sent to 150 preservation nonprofit email addresses. The entities were chosen to represent a diverse sample of organizations based on size and location. The survey posed curated questions about the respondent, their organization, and communications. Individual interviews with organizational staff were then scheduled with those who volunteered to participate. The interviews were conducted to gain a deeper understanding of communication efforts that were both successful and a learning opportunity, while also asking questions regarding responses to the survey. The combination of the two methods provided the ability to identify and analyze trends within nonprofits while developing case studies of campaigns for future reference.

This chapter begins with a discussion of data collection methods, including details about the parameters used to choose the study sample, as well as a description of the survey and interview questions. Following this is a discussion of the data analysis process used to determine trends.

Data Collection

The use of a mixed-method approach to research provides the ability to collect different types of information in the format that is most appropriate.⁸⁸ The strengths of each mode offset the weaknesses of the others to maximize the outcomes within the timeframe of the data collection.⁸⁹ The survey used within this research compiled consistent data across the sample respondents and provided the opportunity for comparison and trend analysis. While answers to survey questions are useful in answering research questions, interview participation provides additional context to communication strategies. Using a mixed methodology approaches the research question multiple ways in order to develop answers.⁹⁰

Survey

The survey was distributed through the online platform Qualtrics. This allowed the ability to create and distribute the survey and securely store the data collected. The survey consisted of 40 to 54 questions, depending on the respondents' answers, and should have taken 15 to 20 minutes to complete. The time commitment to complete the survey was taken into consideration during development to ensure enough data was collected while minimizing the time burden on the respondents. For respondents of surveys, the length of time it takes to complete can lead to mid-survey terminations, something to be avoided.⁹¹ A round of testing with fellow students who are familiar with

⁸⁸ Don A. Dillman, Jolene D. Smyth, and Leah Melani Christian, *Internet, Phone, Mail, and Mixed-Mode Surveys: The Tailored Design Method*, (Hoboken, NJ: John Wiley & Sons, 2014), 2.

⁸⁹ Dillman, Smyth, and Christian, *Internet, Phone, Mail, and Mixed-Mode Surveys*, 12.

⁹⁰ Abbas Tashakkori and Charles Teddlie, *Mixed Methodology: Combining Qualitative and Quantitative Approaches* (Thousand Oaks, CA: Sage Publications, 1998), 20-26.

⁹¹ Dillman, Smyth, and Christian, *Internet, Phone, Mail, and Mixed-Mode Surveys*, 32.

the subject matter was conducted to test the functionality of the survey and get an accurate estimate of completion time.

The survey was delivered to a study sample of historic preservation nonprofits on the East Coast to have a targeted sample size. The East Coast was selected as the region of study due to the prevalence of preservation in the area. These organizations were selected through recommendations from my thesis committee as well as through comprehensive internet research. The organizations selected represent a range of type (community vs. city vs. state), size of staff, and location. They were strategically chosen to have a diverse study sample representing a full range of organization size and personnel types. Email addresses for the survey participants were collected from the official organization websites, focusing where possible on reaching specific staff members who managed communication, or a related job title.

The Qualtrics platform offers the opportunity to ask a variety of forms of questions including free form, multiple choice, Likert scales, and percentage sliders. The complete list of survey questions is included in Appendix A. The survey was organized into four sections to help both the survey taker and data collection. The first set of questions pertain to background information of the respondent, including current job title, education level, and any training specific to nonprofit communication.

The second section was focused on background information of the organization including location, number of employees, operational budgets, and board of directors. This section ultimately helped to categorize the nonprofits into different groups for data analysis and comparison. The third survey section pertained to mission and focus of the

organization including specific focus areas of preservation, mission statement, and if the organization is membership-based.

The last group of questions concerned the nonprofit's communication strategies in an effort to understand approaches taken to analyze trends of communication within the respective organizations. The questions addressed methods of communication, size of total audience, target audiences reached with communication, and frequency of communication evaluation. The final question asked participants if they would be willing to participate in an additional 30-minute interview to discuss an example of the communication campaign specific to their organization as well as discuss answers to the survey questions.

Since the survey and interview included participants, Clemson University Institutional Review Board (IRB) approval was required prior to distribution. This included the survey format, interview questions, and any materials sent to the potential participants. The IRB application materials are included in Appendix C. As there was no intended risk to the study subjects, my project was approved by the IRB on December 11th, 2023.

The first distribution of the survey was delivered via email through Qualtrics on December 11th, 2023. Eleven email addresses either bounced or failed; in those cases, the same email was sent via university email address to reach those contacts. Reminder emails were sent via Qualtrics to those who had yet to complete the survey on January 3rd, 2024, and again on January 16th, 2024. The final survey was completed on January 31st and data was collected following this date.

Interview

The second stage of data collection was an interview with participants who completed the survey. Survey respondents were asked if they were willing to participate in an interview to discuss a specific case study within their organization. The role of a case study within a research methodology was to illustrate a decision or set of decisions, including why they were taken, how they were implemented, and with what result to study real-world examples with contextual conditions.⁹² The interview questions were designed to garner more information beyond the survey or to elaborate on the responses. The case studies and responses to the interview questions could be helpful to historic preservation nonprofit organizations. Future communication campaigns could benefit from examples of both positive experiences and learning opportunities from similar organizations.

Prior to interviews, a set of seven questions was developed to collect consistent information. Because many of the interviews were conversational, the exact questions were not asked or in this order, but much of the information was gleaned throughout the discourse. The complete list of interview questions can be found in Appendix B. The interviews were conducted on Zoom with only the audio from the meetings collected and stored for future use, only accessible by the author. Nine interviews were conducted starting January 11th through January 31st, 2024.

⁹² Robert K. Yin, *Case Study Research: Design and Methods* (California: Sage Publications, 2014), 15-16.

Data Analysis

Following the data collection from both the survey and interviews, responses were compared across nonprofit organizations. The data gathered from the completed Qualtrics survey was formatted and adjusted into an excel spreadsheet to generate tables of responses. Since a variety of questions were asked, the analysis includes both quantitative and qualitative trends of information. The data was grouped to understand trends of communication strategies against organizations of different sizes, in different regions, and organizational goals. Questions regarding the organization size, including annual operating budget, number of employees, membership, and audience size were evaluated first to determine the metrics to measure “size”.

The first group of data analyzed evaluated the distribution of the organization including the size, location, board size, and operational budget. Next, the distribution of respondents’ background information was reviewed, including duration at their current nonprofit, educational background, and training specific to nonprofit preservation communication. Comparisons were then evaluated to see relationships between the respondents and the organization, such as do larger organizations have dedicated communications staff or an employee with a communications background.

The analysis of communication strategies was then evaluated to understand the basic distribution of answers regarding rankings of importance, types of media, and how funds are generated. Comparisons of this information were then conducted against the organizational information to determine any trends or differences. Charts and graphs of the quantitative survey data were developed, including pie charts showing organizations

differences, bar charts showing comparisons of annual operating budgets, and graphs showing trends across various data points.

Qualitative analysis was also completed for the interviews to create summaries of the conversations to serve as examples, while also understanding the trends amongst the interviews. Most of the interviews provided additional context to the survey questions, including a more in-depth discussion of the innovative ways small nonprofits use limited resources to deploy communications to meet their needs. In a few instances, when a survey answer was “I Don’t Know” for a yes or no question, the interview provided additional clarity to the meaning of the response. A number of interviews resulted in specific case studies helpful for other historic preservation nonprofits to provide ideas for communication strategies, creative ways to generate funding specific for communication, and opportunities to reach new audiences.

Finally, all of the data was analyzed to provide ten overarching takeaways of the research. This includes insights from the literature reviewed, data collected from the survey, and responses from the interviews. The ten data points provide a holistic view of the trends of communication amongst the responding organizations.

CHAPTER FOUR: ANALYSIS

The survey and interviews conducted were used to develop an understanding of communication at historic preservation nonprofit organizations by offering quantitative and qualitative analyses. The goal of this thesis is to conduct data-driven research of current communication trends within historic preservation nonprofits to determine if there are differences in priorities, strategies, and measurement by organization size, geography, and the presence of a formal communications role. Additionally, an important consideration for this research is to gain an understanding of how organizations are developing their strategies through professional resources, training, or use of other organizations. The survey responses can point to patterns amongst the respondents and are not representative of all historic preservation nonprofits, given the scope and timeframe of the research.

Presentation of the Data

The survey was emailed to a total of 150 historic preservation nonprofit email addresses representing a diverse cross section of geography, size, and focus area. The survey achieved 40 responses, equating to a 27% response rate. Six of the 40 responses were discarded as the respondent advised they did not want to participate in the study, leaving 34 responses to be analyzed. Of 34 survey responses, 13 were willing to participate in a follow up interview; after outreach, nine interviews were conducted. The survey is not representative of all East Coast historic preservation nonprofits. The information presented is a sample of organizations and the analysis reflects the responses of the data collected. As a condition of the research, all data and responses discussed does

not include identifying information. All tables and graphs were created by the author using data from the survey.

The data collected is organized into three sections for analysis. The first section is information specific to the respondent's organization. The second is an evaluation of demographics of the respondents, and the third section is focused on communication strategies. Each section includes an overview of the data based on the survey questions, an analysis of the results, and comparative trends across data points. Insights garnered from the voluntary follow up interviews are included within the patterns and discussion sections to provide depth to the survey responses.

Likert scale questions were used in a number of areas to enable quantification of preference responses. In order to evaluate the Likert scale questions in the survey, the responses were converted to numbers, scoring them one to four; "Not important at all" was scored as a one and "Very important" a four. The Likert scale approach was also applied to questions ranging from "Extremely unlikely" (converted to one) to "Extremely likely" (converted to four). This allowed for calculation of mean scores to aid in comparison.

Table 4.1 below shows information about organizations that participated in a follow up interview. Nine respondents participated in interviews and are categorized as organization A through I as personal information about the organizations cannot be shared. This table provides points of comparison to aid in the usefulness of the anecdotal information shared throughout the analysis.

Interview Identifier	# of Employees	Date Founded	Region	Community	Annual Budget	Budget for Comms?	Formal Comms Role?	Average Membership	# Of Areas of Focus
A	Less than 10	1940	Southeast	City	Budget <\$1M	Yes	No	400	8
B	Less than 10	1953	Northeast	Town	Budget <\$1M	Yes	No	150	5
C	Less than 10	1936	Northeast	Town	Budget <\$1M	No	No	250	8
D	Less than 10	1978	Southeast	City	Budget <\$1M	No	No	300	6
E	40+	1961	Southeast	City	Budget >\$1M	Yes	Yes	900	3
F	Less than 10	1974	Northeast	State	Budget >\$1M	No	Yes	250	4
G	Less than 10	1977	Northeast	City	Budget <\$1M	No	No	450	6
H	10 - 19	1973	Southeast	State	Budget >\$1M	Yes	Yes	3500	5
I	Less than 10	1978	Northeast	City	Budget <\$1M	Yes	Yes		3

Table 4.1 Categorization of Interview Organizations.

Demography of Organizations

Questions regarding the demography of the respondent’s organization, such as location, number of people employed, and board information, were used to develop comparisons for trends at the organizational level. All the respondents identified their entity as a private organization and a 501(c)3 nonprofit.

Geography

The survey was distributed to organizations in 18 states on the East Coast, but not every state had a response to the survey; 14 states are reflected in the data as shown in Figure 4.1. Connecticut, Delaware, New Hampshire, and West Virginia did not have responses. The respondents reflect a geographic spread across the East Coast. Geography will be used as a point of comparison for evaluating communication strategies, grouping the respondents into Northeast and Southeast regions. There are some overrepresentations of responses within some states and underrepresentation in others, however the regional distribution between Northeast and Southeast is even. States included in the Northeast grouping are Washington, DC, Maine, Maryland, Massachusetts, New Jersey, New York, Pennsylvania, Rhode Island, and Vermont. Southeastern states reflect Florida, Georgia,

North Carolina, South Carolina, and Virginia. Of the 34 respondents, 56% are located in the Northeast and the remaining 44% are in the Southeast.

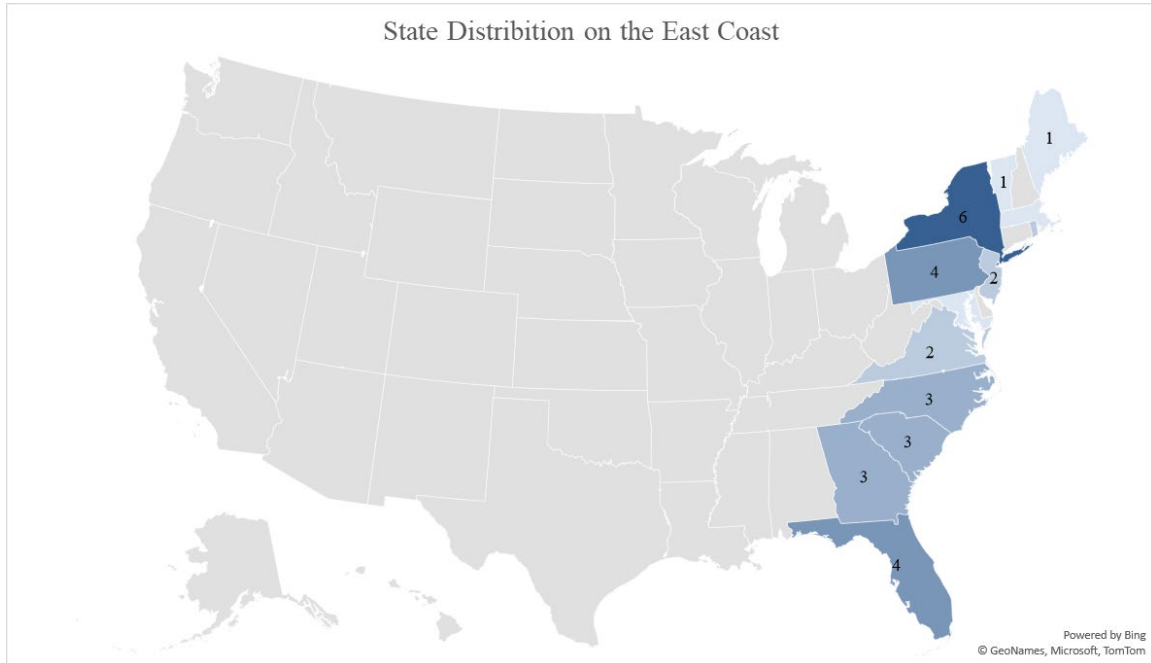


Figure 4.1 State Distribution of Respondents.

Type of Community Served

To provide an additional breakdown of regionality, the type of community served by the nonprofit shows 53% of the organizations serve a city, 24% serve a state/tri-state region, 15% local communities, 6% county/tri-county area, and 3% the entire eastern seaboard (Figure 4.2). Despite distributing the survey to a range of organizations, the majority of the respondents reach a similar type of community, suggesting the focus of the historic preservation nonprofits is a local approach.

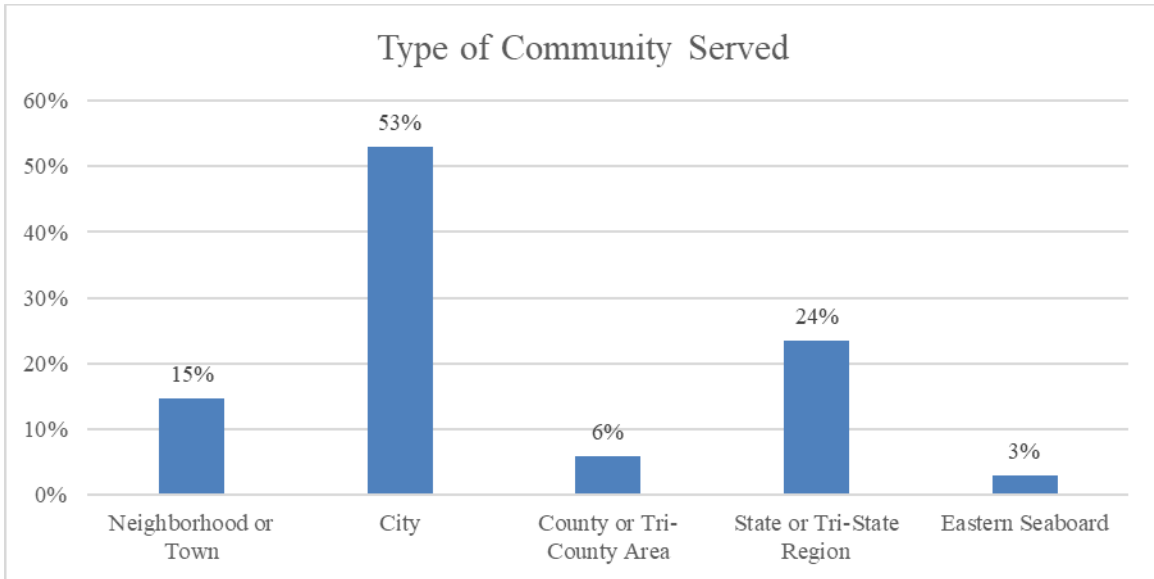


Figure 4.2 Type of Community Served.

For Southeast respondents, 67% are reaching a City, the highest amongst all options in the region and a higher percentage compared to the 42% within the Northeast (Figure 4.3). The distribution of regions in the Northeast is spread out across a few of the responses, with 21% in a Town/Neighborhood, 42% in a City, and 32% for State/Tri-State Region. Due to the number of responses, evaluating the nonprofits based on the type of community they reach was not included in the analysis. As many of the respondents work with city-focused organizations, the analysis would not provide an adequate view of the trends based on community. Should similar research be conducted that yields additional responses across a range of community types, this could provide insights into the specifics of communication methods by community type.

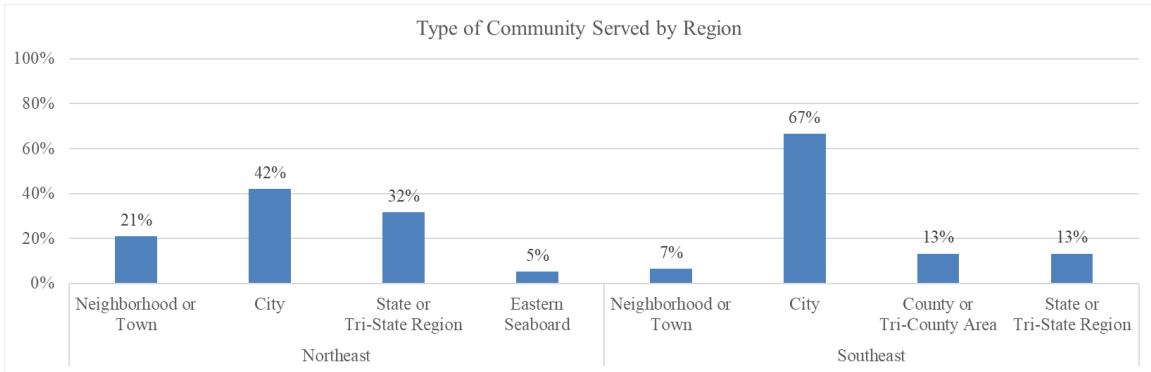


Figure 4.3 Type of Community Served by Organization by Region.

Size of Staff

Seventy-one percent of the nonprofits have less than ten-person full-time staff (Figure 4.4). Twenty-four percent have 10-19 employees and both the 20-29 and 40+ had one response each, indicating majority of respondents have a small overall staff. The singular response that had 40+ employees has a large operating budget and the highest volume of board members, reflecting an abnormality amongst the responses.

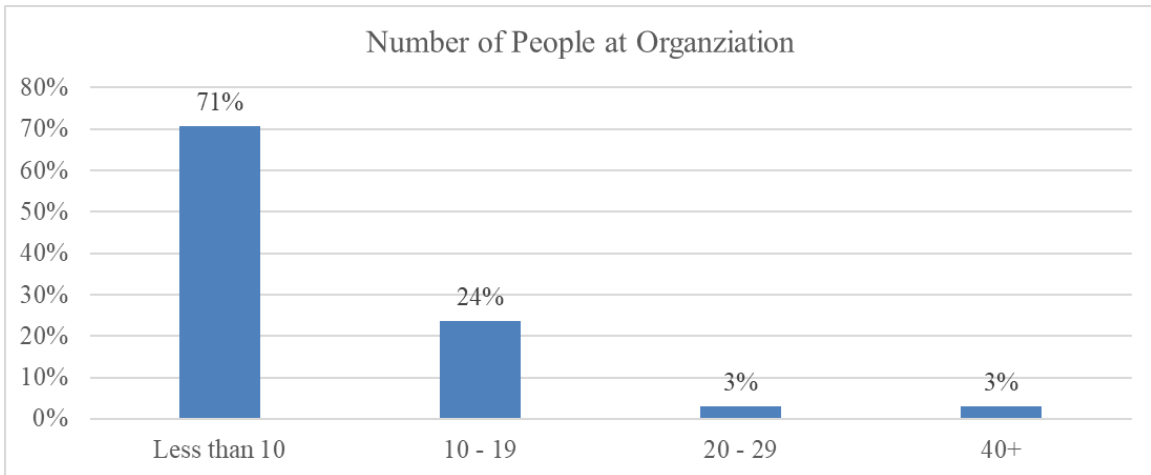


Figure 4.4 Number of People at Organization.

Size of Budget

Figure 4.5 shows 41% of respondents indicated their annual operating budget was under \$250,000, 15% between \$250,000 and \$499,000, 9% between \$500,000 and \$1 million, 24% between \$1 million and \$2 million, and 12% above \$2 million. At the outset of this project, it was expected that the number of employees would provide an indication of organization size. However, the data shows that there is insignificant differentiation based on number of people. Evaluating the respondent organizations based on budget provides a meaningful comparison. Annual operating budget will be used as a point of comparison for organization size; the groups will be separated between those that have an annual budget of under \$1 million and those over \$1 million to differentiate “Smaller” and “Larger” nonprofits.

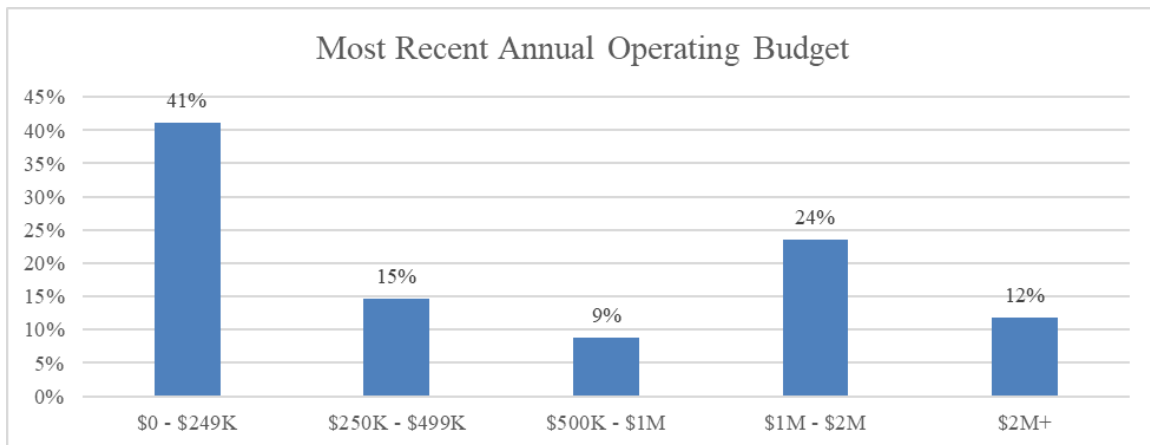


Figure 4.5 Annual Operating Budget.

As the literature notes, establishing a budget for communications is a challenge for nonprofits. Often, tactics that are the most cost effective for the organization and provide the greatest benefit are funded first, and that may be something other than

communication.⁹³ As such, nonprofits often have to find alternative ways to support their communication efforts.

Respondents were asked if they had a separate budget for communication initiatives within their operating budget; 59% indicated a specific budget for communication. This data is likely skewed however, as the respondents were aware this survey was specific to communication. Of the 20 organizations that indicated a separate communication budget, 18 noted this budget was under \$100,000 and two stated a budget between \$100,000 and \$250,000, showing little range of communication-specific budgets. During the follow-up interviews, a few participants shared these budgets often include fees for the website, newswire memberships, email distribution, printing of mailers, and paid advertising.

The survey asked respondents to rank the importance of generating operational funds for the organization (Table 4.2). Donations (3.85) and membership (3.26) were, on average, identified as “Very Important”, as the full sample mean score is close to the maximum ranking of four. Retail Sales ranked the lowest importance, averaging between “Not important at all” and “Slightly important”. An “Other” textbox was included to capture alternative ways in which historic preservation nonprofits are generating funds outside of the survey options presented. In order of frequency, additional resources included grants, special events, fundraisers, lectures, and endowment funds. A future

⁹³ Heyman, *Nonprofit Management 101: A Complete and Practical Guide for Leaders and Professionals*, 422

survey could include additional categories in order to provide additional data on funding sources.

Memberships	Donations	Retail Sales	Historic Site Entry/Tour Tickets	Walking Tour Tickets	Other
3.26	3.85	1.88	2.09	2.09	3.85

Table 4.2 How Operational Funds Are Generated.

Date of Creation

Figure 4.6 below illustrates that 68% of responding organizations were established between 1950 and 1980, aligning with the creation of the National Register of Historic Places in 1966. The distribution provides an evaluation of organizations of generally the same age.

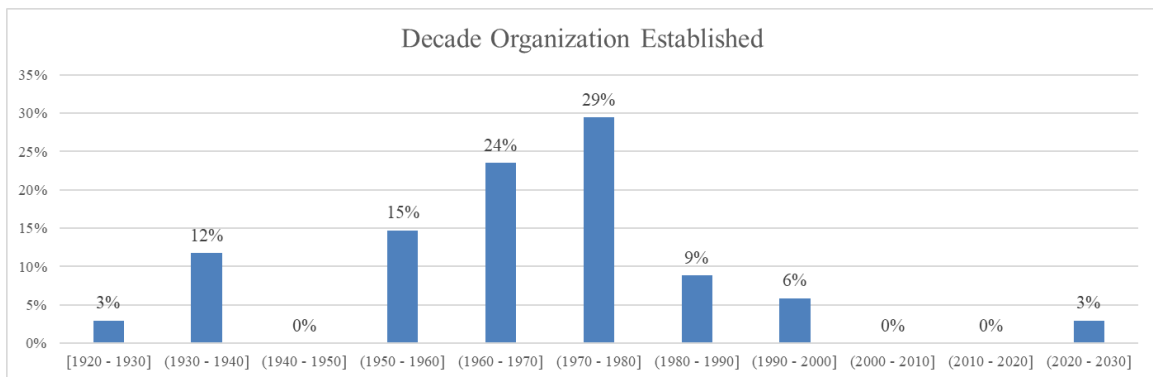


Figure 4.6 Decade Organization Established.

Size of Board

Of the 34 responses, one indicated they do not have a board of directors, and 70% had between five and 20 board members (Figure 4.7). One organization had a board with 75 members; while still included within the analysis, an outlier amongst the responses. Prior to data collection, volume of board members was anticipated to be a means of comparison for strategies employed, providing insight into the ways in which

communication strategies were determined, executed, and measured. Since many of the responding organizations had similarly sized boards, this data was not used to show the comparison of communication methods. However, when asked if the board, or a subcommittee, advises on communications, 58% said they do not, 39% said they do, and the remaining 3% responded “I don’t know”.

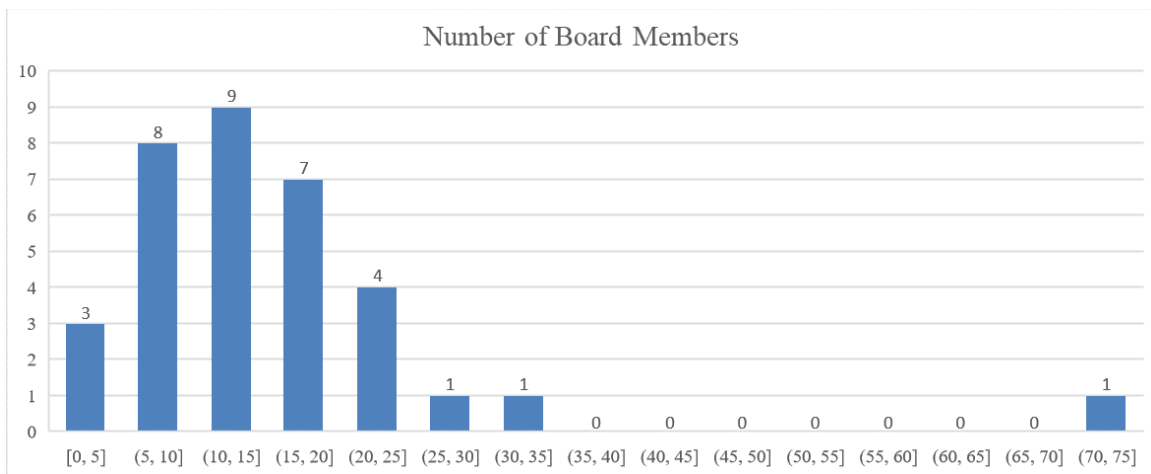


Figure 4.7 Number of Board Members (in increments of five).

Membership Size and Cost

Eighty percent of the organizations are membership based. Eighty-nine percent of those that are membership based have an average membership under 1,000 people (Figure 4.8). Three organizations have between 3,500 and 4,000 members; two are larger state level institutions and one is a city-focused nonprofit, all in the Southeast. Average membership provides a view of the size of a specific communication audience as organizations distribute communication to members on a consistent basis. At the outset of this project, it was expected that there would be a larger range of membership sizes amongst organizations, providing a point of comparison to develop trends. However, 89% of respondent organizations had similar membership sizes as well as inconsistent

data comparisons with the outliers rendering these data points unhelpful to develop trends of communication strategies.



Figure 4.8 Average Membership.

As with membership volume, the average cost of membership was relatively similar, with 52% of responding organizations charging under \$50 for a membership (Figure 4.9). Forty-one percent of respondents have a membership between \$50 and \$99, with the remaining 7% over \$100. Membership cost remains consistent between the organizations. Membership and membership fees are important for historic preservation nonprofits, but alternative funding sources should be considered based on the data reflecting the reported membership volume and fees.

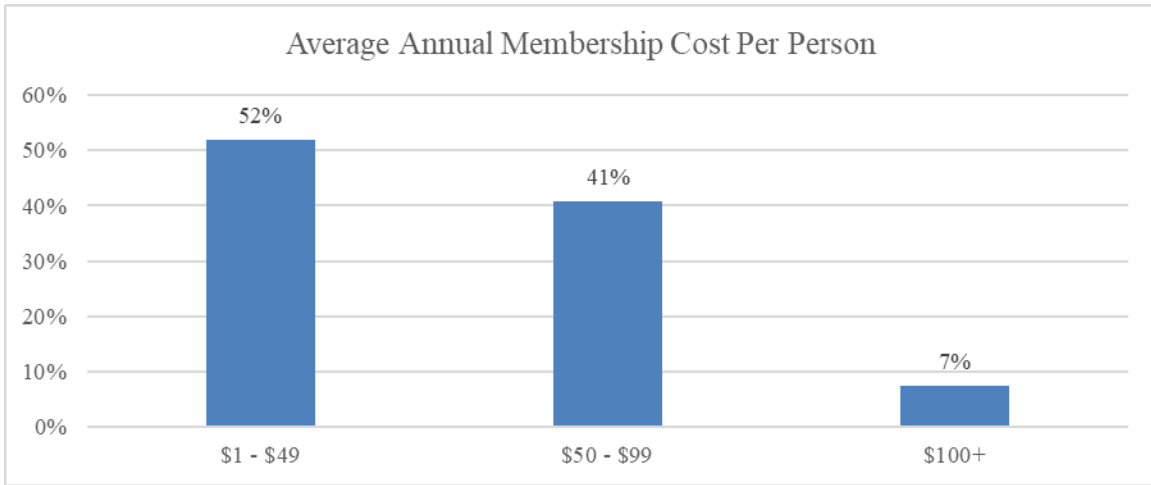


Figure 4.9 Average Annual Membership Cost Per Person.

Overall Organization Patterns

This section provides a comparative analysis of the responses to questions about the responding organizations to determine commonalities and differences. When comparing the number of employees by region, organizations in the Southeast had a higher number of full-time staff compared to those in the Northeast with a higher percentage of respondents falling in the 10-19, 20-29, and 40+ ranges (Figure 4.10). This could be an indication of several factors, including the priorities of the respondents, nuances of the goals, and budget for staffing. However, both regions show a trend of a low number of employees.

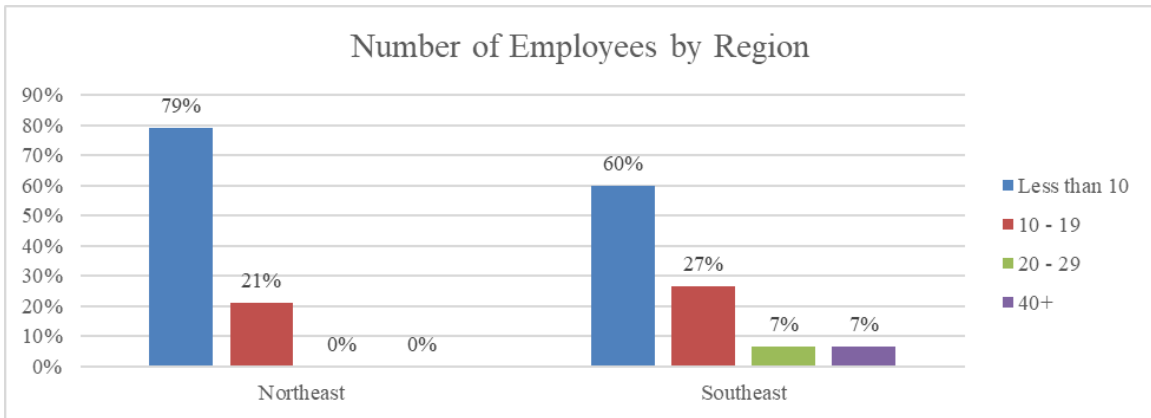


Figure 4.10 Number of Employees by Region.

To compare the size of the organization against the number of employees, Figure 4.11 suggests Larger budget organizations have more staff, as expected. The chart is arranged by budget size; the bars show institution count with colors reflecting the number of staff members. The lowest annual operating budget has the highest number of nonprofits with less than 10 employees. Conversely, organizations with a budget greater than \$2 million have a higher percentage of 40+ employees. This also shows that most of the responding organizations are smaller in both number of staff as well as operating budget. This could be an indication that historic preservation nonprofits typically have a staff under 10 people.

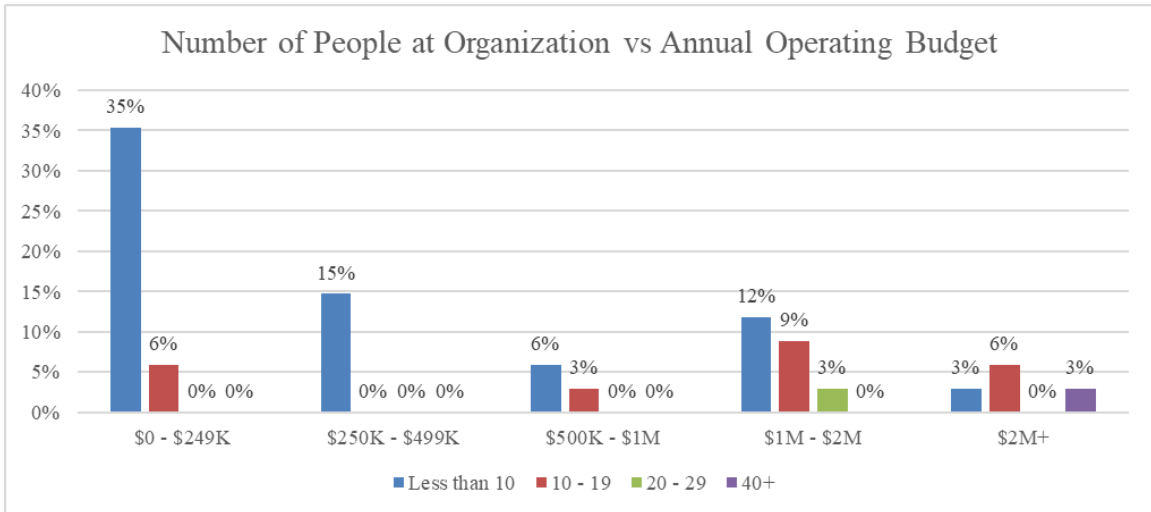


Figure 4.11 Number of People Employed At Organization by Annual Operating Budget.

The distribution of budget by region is relatively similar between the Northeast and Southeast (Figure 4.12). Both regions have predominantly Smaller organizations, with 63% in the Northeast and 67% in the Southeast.

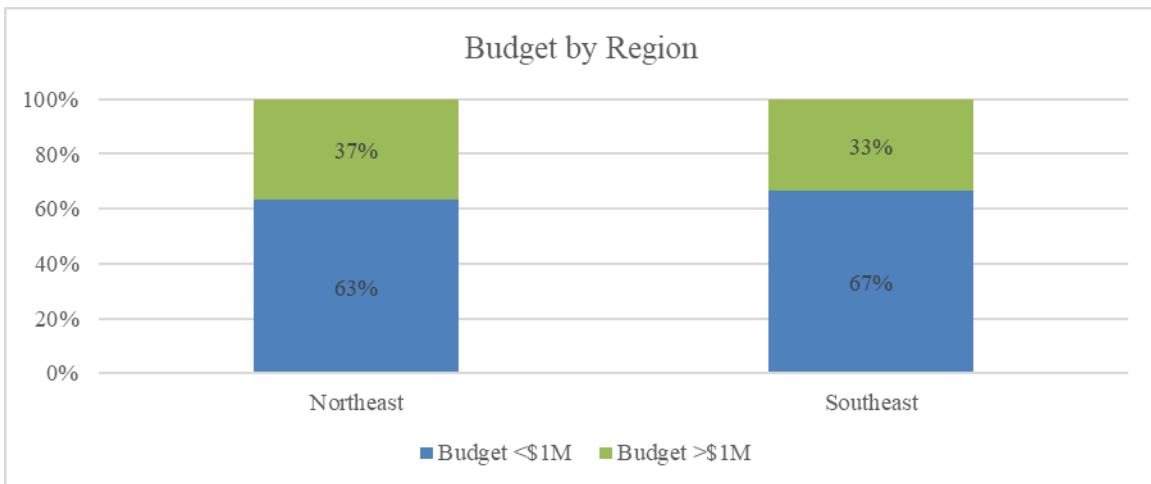


Figure 4.12 Budget by Region.

When comparing organizations with a budget over \$1 million (“Larger”) and those with a budget under \$1 million (“Smaller”), the methods of generating funds rank

similarly (Table 4.3). Organizations with Smaller budgets rank each method of generating funds slightly higher than those with Larger budgets. This could be an indication that Smaller budget organizations are relying on all methods to generate funding. Smaller budget organizations ranked memberships much higher compared to Larger budget organizations. This shows the importance of obtaining new members for Smaller organizations. This could also be an indication that organizations with Smaller budgets do not have the capacity to spend on areas other than immediate membership concerns.

Annual Operating Budget	Memberships	Donations	Retail Sales	Historic Site Entry/Tour Tickets	Walking Tour Tickets	Other
<\$1M	3.41	3.86	1.95	2.09	2.09	3.92
>\$1M	3.00	3.83	1.75	2.08	2.08	3.75

Table 4.3 How Organizations Are Generating Funds by Budget.

Regionally, Southeast respondents ranked all sources of generating funds higher than those in the Northeast, except for the Other category (Table 4.4). The differences between the regions are significant, showing a consistency in answers. This is notable considering the fairly equitable distribution of budget within the two regions. The largest disparities are within retail sales and tickets, an indicator of the offerings of the organizations within the two regions. This data suggests organizations in the Southeast put an emphasis on generating funding.

Geography	Memberships	Donations	Retail Sales	Historic Site Entry/Tour Tickets	Walking Tour Tickets	Other
Northeast	3.05	3.74	1.47	1.68	1.95	3.90
Southeast	3.53	4.00	2.40	2.60	2.27	3.80

Table 4.4 How Organizations Are Generating Funds by Region.

Membership data is very concentrated as 89% of respondents had a membership under 1,000. The average membership by budget shows organizations with a larger budget have higher membership numbers (Figure 4.13). There is a higher concentration of smaller organizations with membership under 500 people. This is expected as those with a larger operating budget have higher membership fees as shown in Figure 4.14.

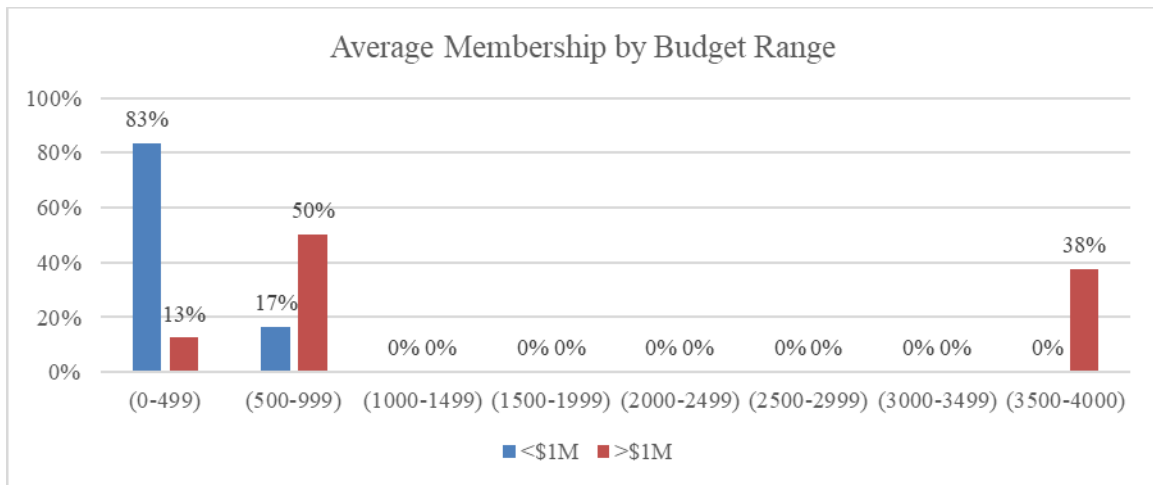


Figure 4.13 Average Membership by Budget Range.

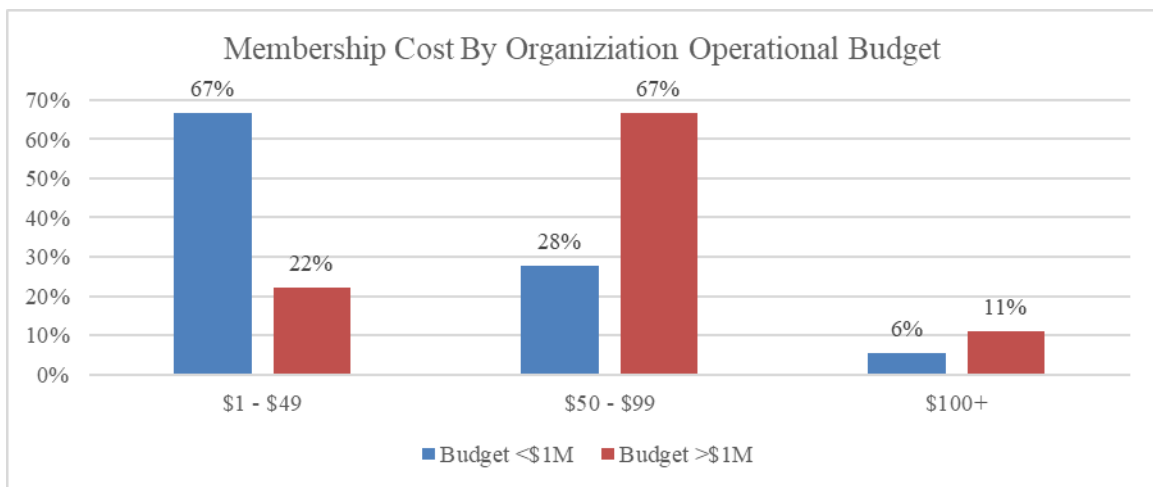


Figure 4.14 Membership Cost by Organization Operational Budget.

Demography of Respondents

This section evaluates demographic information about the individual responding to the survey to garner data on their background, training, and time with the organization. Since one objective for this research was to learn about specific resources for communication in historic preservation nonprofits, the respondents provided information on training they rely on for ideas.

Background in Communications

When asked about education experience, 76% of respondents stated they did not have an education that focused on communication. Of the 24% who did have an education in communication, some of those degrees included bachelor's degrees in Communications, Journalism, Marketing, History, English, Writing, and master's degrees in English, Public History, Marketing. Since the majority of those who completed the survey did not have a background in communication, this metric was not used to provide a comparison of communication strategies.

Training

Despite not having an educational background in communication, 71% answered "No" to participation in training specific to nonprofit historic preservation communication. This is likely due to the limited training available of this niche expertise. Of the 29% who responded "Yes", training included workshops on nonprofit management, undergraduate and graduate level courses in marketing and communications, conferences, webinars, other local nonprofits, and the National Preservation Partners Network.

Time with Organization

Forty-four percent of respondents have worked at their current organization between one and five years (Figure 4.15). The full sample data set collected reflected a range of employment duration amongst the responses. Fifty-six percent of the respondents indicated that they have not held previous positions with their current employer, indicating the data includes a blend of employees.

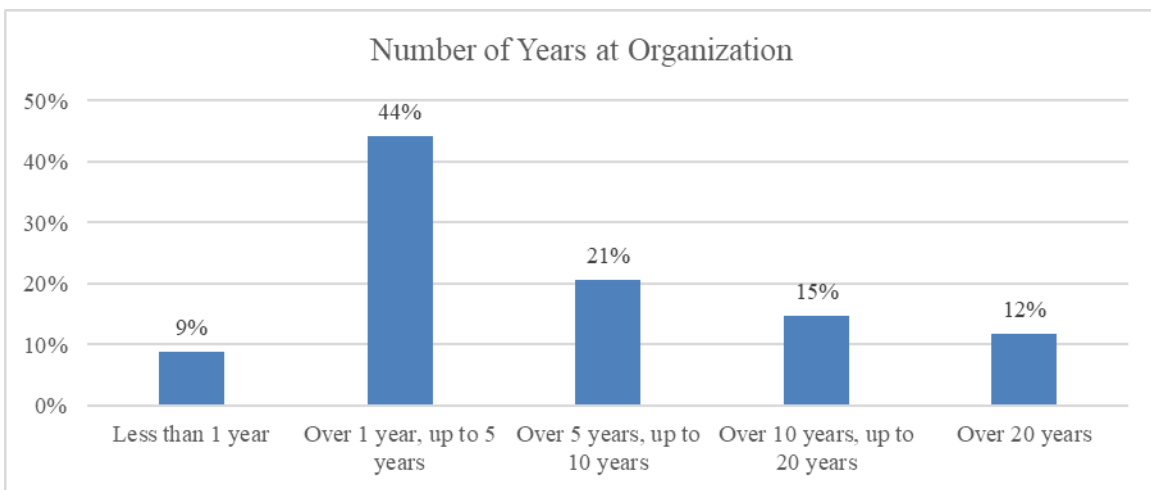


Figure 4.15 Number of Years at Organization.

Patterns with Respondents

At organizations with a Smaller budget, respondents are likely to have an education focused on communication, compared to organizations with a Larger budget, which does not correlate with the other trends regarding communication within this research (Figure 4.16). While this does not speak to work experience between education and their current position, this was not the expectation prior to analysis. Budget does not have a bearing on the communication education within the respondents.

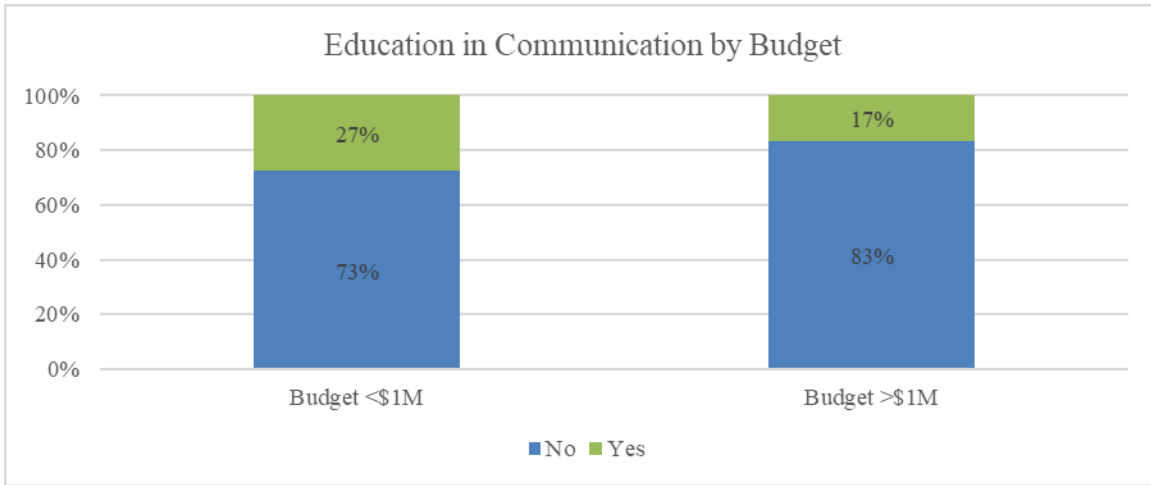


Figure 4.16 Education in Communication by Budget.

Conversely, a background in communication does play a role in regionality. 40% of respondents in the Southeast had an education in communication, compared to only 11% in the Northeast (Figure 4.17). This shows that having an education in communication is not a clear indicator for an organization’s strategic approach to communication based on the trends of this data.

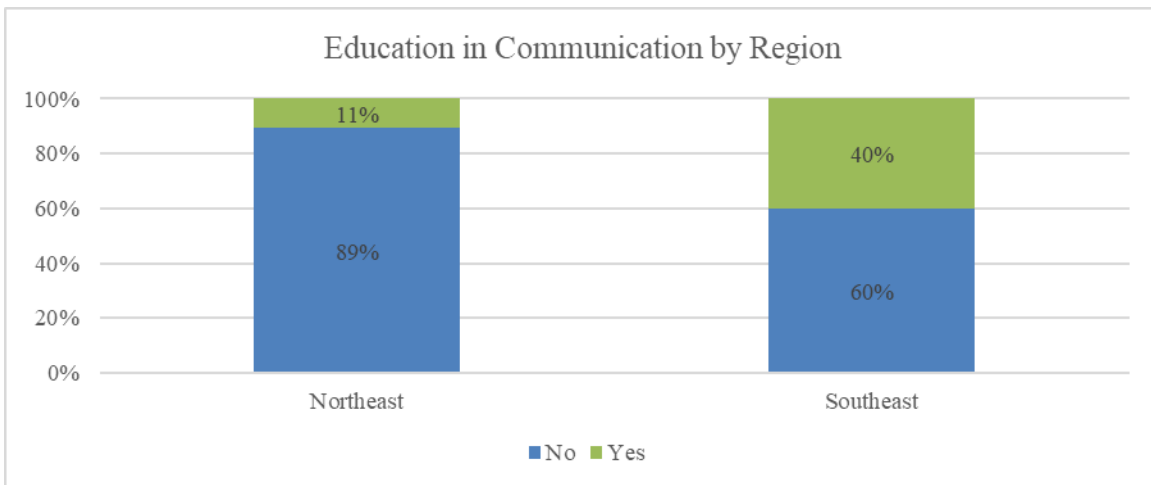


Figure 4.17 Education in Communication by Region.

An education in communication and the presence of a formal communications role has a direct correlation (Figure 4.18). For organizations with a formal communications role, 40% have an education in communications while only 11% have the same background for organizations without a formal communications role.

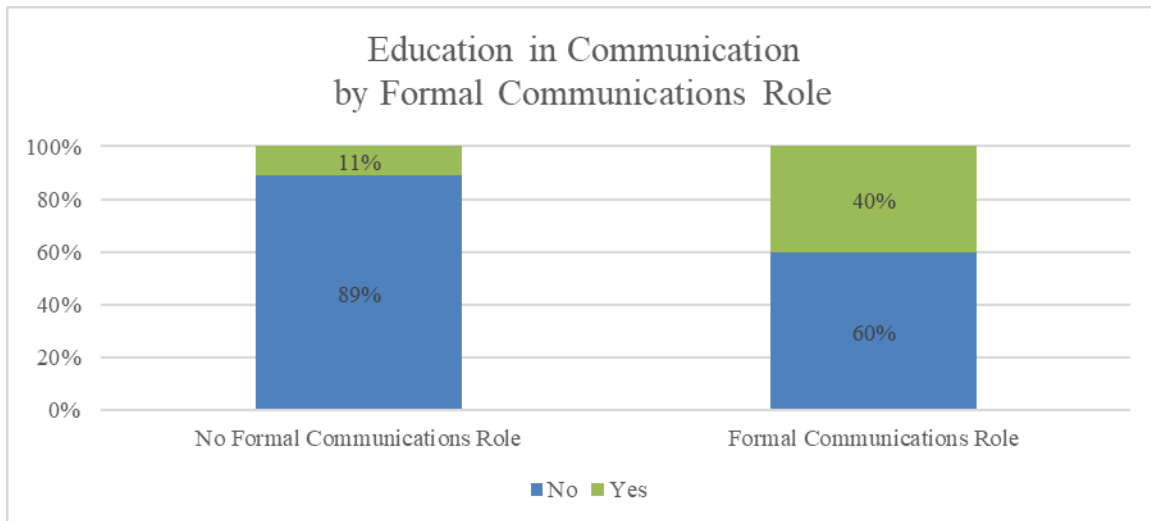


Figure 4.18 Education in Communication by Formal Communications Role.

Analysis of Survey Results Regarding Communication Strategies

This section begins by discussing the presence of a formal communications role at the responding organizations, which in turn provided a point of comparison for communication strategies. Next, the preservation priorities of the responding organizations is analyzed alongside the likelihood they would be included in communications. Next, the methods of communication and audience strategies are evaluated. Finally, an assessment of communications planning is included, reviewing the ways in which the organizations are discovering new ideas. Within this analysis,

qualifiers from both the respondent and organization demographic responses will be used to compare strategies employed.

Formal Communications Role

Forty-four percent of respondents indicated that their organization had a formal communications role. To further evaluate, comparing the size by budget and if they have a communications role, Figure 4.19 shows that there is a direct relationship between the size of the organization and a communications role. As expected, 75% of nonprofits with a Larger budget have a staff member specifically responsible for communication. Note, the one “I don’t know” response to the question about a formal communications role was removed in this analysis.

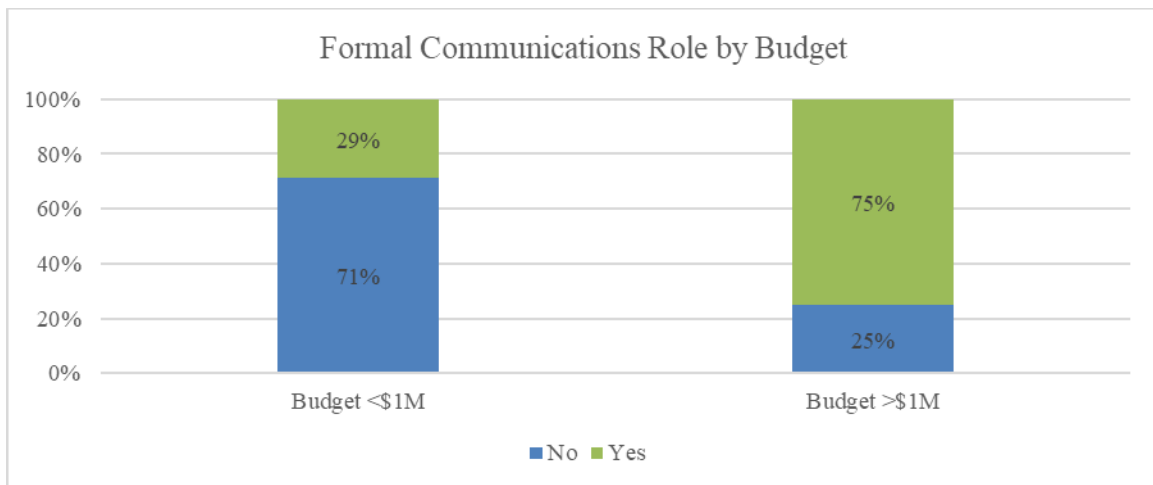


Figure 4.19 Formal Communications Role by Size of Organization.

Notably, the Southeast had a higher percentage of respondents with a formal communications role, 60% compared to the Northeast with 33% (Figure 4.20). This also aligns with the previous analysis that respondents in the Southeast have a higher number of employees.

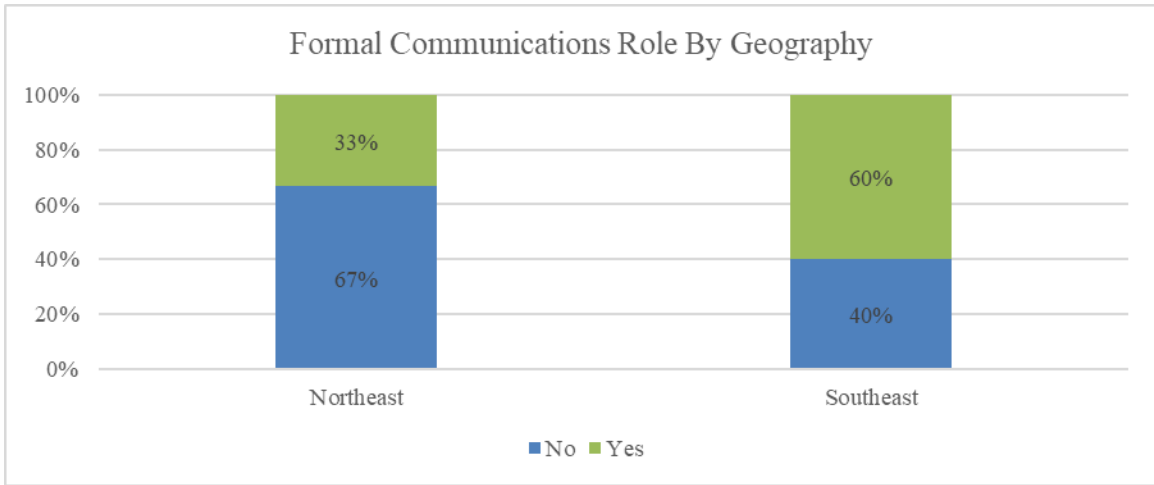


Figure 4.20 Formal Communications Role by Geography.

Preservation Priorities and Communication

To provide an overarching view of focus areas of the nonprofits, all participants selected which areas of preservation their group prioritizes, with the ability to select as many as applicable. As shown in Figure 4.21, there were nine options to choose from and, on average, respondents chose 5.6. Responding organizations had an equitable distribution across topics, with the exception of cultural resource management, which reflected 5% of the total volume of responses. Public education was the most popular area of historic preservation, accounting for 16%.

When comparing the average importance for Smaller and Larger organizations, Smaller budget organizations chose more of the options (5.9) compared to Larger budget (5.1). This is unexpected as organizations with Smaller budgets would likely have less funding to support a higher volume of initiatives. This shows that Larger organizations are focusing on a reduced number of areas, with increased support behind each area, instead of spreading the budget across an array of options. The Larger organizations have

a concerted effort for their initiatives. Smaller groups could benefit from prioritization and focus on fewer areas, which might help alleviate budget concerns.

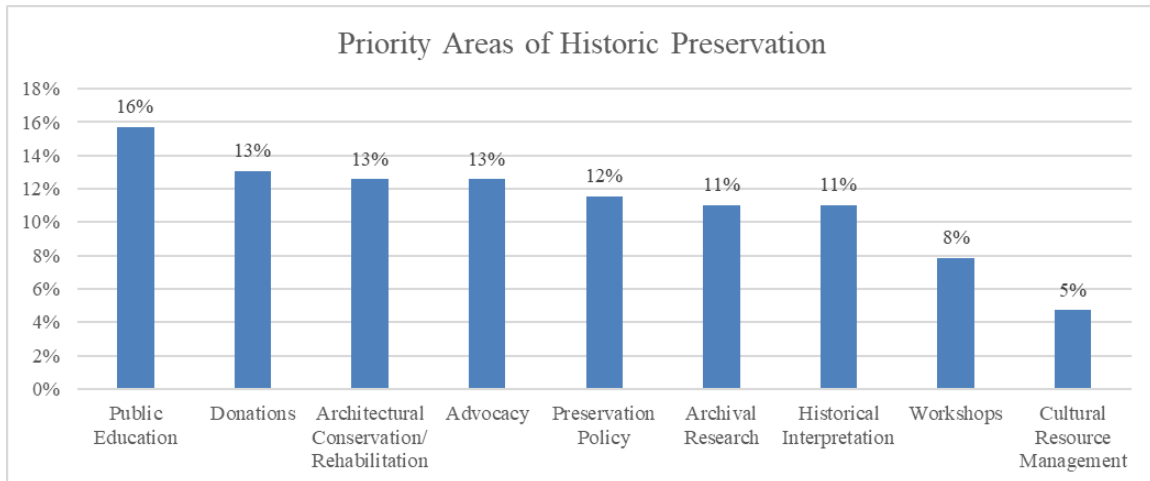


Figure 4.21 Priority of Areas of Historic Preservation (percentage of total responses).

Follow up survey questions asked respondents about both the importance of these areas of historic preservation and the likelihood to communicate them. Table 4.5 through Table 4.11 evaluate the difference between the relative mean ranked importance of the various aspects of preservation and the mean ranked likelihood to communicate them. Respondents are more likely to communicate about workshops (ranked 3.2 out of 4) compared to the importance of workshops to the organization (3.53) (Table 4.5). The opposite was observed for preservation policy and archival research; organizations ranked those areas higher in importance compared to the likelihood to communicate.

	Architectural Conservation/Rehabilitation	Preservation Policy	Archival Research	Public Education	Advocacy	Workshops	Donations	Historical Interpretation	Cultural Resource Management
Importance	3.79	3.59	3.24	3.77	3.71	3.20	3.68	3.43	3.33
Likelihood to Communicate	3.63	3.32	2.95	3.67	3.67	3.53	3.44	3.43	3.11
Difference	0.17	0.27	0.29	0.10	0.04	(0.33)	0.24	-	0.22

Table 4.5 Mean Ranked Importance and Mean Ranked Likelihood to Communicate Overall (Mean Scores on a Scale of 1-4).

Smaller budget organizations ranked archival research higher compared to workshops in terms of importance. Workshops are likely tracking higher for Larger organizations due to their capacity to support additional programming. Smaller budget organizations include local historical societies, which is likely contributing to the higher archival research importance. Architectural conservation/rehabilitation, preservation policy, and public education had the mean highest ranking of Larger organizations.

When comparing the importance and likelihood to communicate for organizations Smaller organizations, workshops and preservation policy are areas that did not align (Table 4.6). Preservation policy ranked higher for importance compared to the likelihood to communicate and the opposite is observed for workshops.

For Larger organizations, archival research saw the largest gap between the two rankings, however archival research for Larger budget organizations was ranked the lowest of all of the categories (Table 4.7).

	Architectural Conservation/Rehabilitation	Preservation Policy	Archival Research	Public Education	Advocacy	Workshops	Donations	Historical Interpretation	Cultural Resource Management
Importance	3.75	3.53	3.35	3.80	3.73	2.89	3.76	3.40	3.33
Likelihood to Communicate	3.56	3.07	3.12	3.65	3.53	3.33	3.47	3.40	3.00
Difference	0.19	0.47	0.24	0.15	0.20	(0.44)	0.29	-	0.33

Table 4.6 Mean Ranked Importance and Mean Ranked Likelihood to Communicate Overall for Budget <\$1 million (Mean Scores on a Scale of 1-4).

	Architectural Conservation/Rehabilitation	Preservation Policy	Archival Research	Public Education	Advocacy	Workshops	Donations	Historical Interpretation	Cultural Resource Management
Importance	3.88	3.71	2.75	3.70	3.67	3.67	3.50	3.50	3.33
Likelihood to Communicate	3.75	3.86	2.25	3.70	3.89	3.83	3.38	3.50	3.33
Difference	0.13	(0.14)	0.50	-	(0.22)	(0.17)	0.13	-	-

Table 4.7 Mean Ranked Importance and Mean Ranked Likelihood to Communicate Overall for Budget >\$1 million (Mean Scores on a Scale of 1-4).

Regionally, public education, workshops, and historical interpretation ranked higher in importance in the Northeast. Southeast ranked the likelihood to communicate historical interpretation higher, however Northeast organizations indicated the topic is slightly more important to them, but they are less likely to communicate. In the Northeast, a disparity was observed between both workshops and donations when comparing importance and likelihood to communicate (Table 4.8). Workshops were ranked higher for likelihood to communicate compared to importance, while donations were more important compared to the likelihood to communicate. Given the responses to other survey questions, it is surprising that donations ranks highly for importance, however communicating the need for donations is not ranked as highly.

In the Southeast, workshops once again sees a large difference between importance and communication (Table 4.9). Compared to the Northeast, preservation policy and archival research also see a discrepancy for the Southeast. Both of these categories saw higher mean importance compared to the likelihood to communicate.

	Architectural Conservation/ Rehabilitation	Preservation Policy	Archival Research	Public Education	Advocacy	Workshops	Donations	Historical Interpretation	Cultural Resource Management
Importance	3.69	3.46	3.00	3.88	3.67	3.27	3.62	3.45	3.25
Likelihood to Communicate	3.62	3.31	3.10	3.69	3.50	3.55	3.23	3.36	3.25
Difference	0.08	0.15	(0.10)	0.19	0.17	(0.27)	0.38	0.09	-

Table 4.8 Mean Ranked Importance and Mean Ranked Likelihood to Communicate Overall for Northeast (Mean Scores on a Scale of 1-4).

	Architectural Conservation/ Rehabilitation	Preservation Policy	Archival Research	Public Education	Advocacy	Workshops	Donations	Historical Interpretation	Cultural Resource Management
Importance	3.91	3.78	3.45	3.64	3.75	3.00	3.75	3.40	3.40
Likelihood to Communicate	3.64	3.33	2.82	3.64	3.83	3.50	3.67	3.50	3.00
Difference	0.27	0.44	0.64	-	(0.08)	(0.50)	0.08	(0.10)	0.40

Table 4.9 Mean Ranked Importance and Mean Ranked Likelihood to Communicate Overall for Southeast (Mean Scores on a Scale of 1-4).

Organizations with a formal communications role ranked architectural conservation/rehabilitation, preservation policy, and archival research higher in importance compared to respondents without a formal communications role. Nonprofits that have a formal communications role, reported archival research relatively important for the organization, but found it less likely to communicate, especially compared to the other facets of preservation (Table 4.10). Conversely, workshops were ranked higher to communicate compared to the importance to the organization.

For organizations without a specific communications role, there was minimal difference between the importance of each area and the likelihood to communicate (Table 4.11). Additionally, the importance metrics were all lower than the communication rankings, an indicator of less prioritization for those without communication staff.

	Architectural Conservation/Rehabilitation	Preservation Policy	Archival Research	Public Education	Advocacy	Workshops	Donations	Historical Interpretation	Cultural Resource Management
Importance	3.90	3.88	3.33	3.58	3.73	3.00	3.44	3.22	3.25
Likelihood to Communicate	3.80	3.63	2.67	3.83	3.91	3.83	3.44	3.56	3.50
Difference	0.10	0.25	0.67	(0.25)	(0.18)	(0.83)	-	(0.33)	(0.25)

Table 4.10 Mean Ranked Importance and Mean Ranked Likelihood to Communicate Overall for Formal Communications Role (Mean Scores on a Scale of 1-4).

	Architectural Conservation/Rehabilitation	Preservation Policy	Archival Research	Public Education	Advocacy	Workshops	Donations	Historical Interpretation	Cultural Resource Management
Importance	3.71	3.46	3.21	3.88	3.75	3.33	3.80	3.55	3.40
Likelihood to Communicate	3.50	3.23	3.00	3.59	3.58	3.33	3.53	3.27	2.80
Difference	0.21	0.23	0.21	0.29	0.17	-	0.27	0.27	0.60

Table 4.11 Mean Ranked Importance and Mean Ranked Likelihood to Communicate Overall for No Formal Communications Role (Mean Scores on a Scale of 1-4).

Forms of Communication

Understanding the forms of communication at historic preservation nonprofits is important to determine what methods they use to reach constituents and the importance

of each method. The literature noted that nonprofits should deploy philosophies embraced by for-profit companies such as a marketing plan and a marketing mix. The marketing plan, established alongside organization goals, determines the target audience, goals of the consumer, ways to reach them, and metrics for success.⁹⁴

Amongst all respondents, person to person, email, and social media were the most important methods of communication (Table 4.12). Conversely, radio, podcasts and television ranked very low in importance. Historic preservation nonprofits rely on platforms that are of no cost or a low cost of entry. These resources also require less communications expertise aligning with the fact that about half of the respondents do not have formal communications role.

Person to person	Radio	Podcasts	Television	Email	Paid Search / Search Engine Optimization	Social Media	Print (i.e. Newspapers, Magazines)	Newsletters	Press/Media
3.82	1.50	1.41	1.68	3.91	2.00	3.71	2.88	3.47	3.18

Table 4.12 Overall Mean Ranking of Methods of Communication (Mean Scores on a Scale of 1-4).

When comparing organizations by budget, respondents with both Larger and Smaller budgets have similar high and low rankings, with no sizeable difference in the average responses (Table 4.13). Email, newsletters, and press/media were ranked slightly higher in importance for Larger organizations, whereas social media and print communication ranked higher within Smaller.

Annual Operating Budget	Person to person	Radio	Podcasts	Television	Email	Paid Search / Search Engine Optimization	Social Media	Print (i.e. Newspapers, Magazines)	Newsletters	Press/Media
<\$1M	3.82	1.45	1.50	1.68	3.86	1.95	3.73	2.95	3.36	3.09
>\$1M	3.83	1.58	1.25	1.67	4.00	2.08	3.67	2.75	3.67	3.33

Table 4.13 Method of Communications Compared to Budget (Mean Scores on a Scale of 1-4).

⁹⁴ Heyman, *Nonprofit Management 101: A Complete and Practical Guide for Leaders and Professionals*, 414.

Surprisingly, the Southeast ranked all methods of communication higher compared to the Northeast, with many of the differences between the rankings fairly high (Table 4.14). This could be attributed to the fact that the Southeast organizations tend to have a formal communications role on staff, resulting in emphasis on all methods of communication. The biggest disparity in rankings is within Television. Southeastern respondents ranked Television much higher than the Northeast.

Geography	Person to person	Radio	Podcasts	Television	Email	Paid Search / Search Engine Optimization	Social Media	Print (i.e. Newspapers, Magazines)	Newsletters	Press/Media
Northeast	3.79	1.21	1.26	1.16	3.84	1.68	3.53	2.63	3.16	2.84
Southeast	3.87	1.87	1.60	2.33	4.00	2.40	3.93	3.20	3.87	3.60

Table 4.14 Method of Communication by Region (Mean Scores on a Scale of 1-4).

Comparing methods of communication against a formal communications role yielded expected results. Organizations with a formal communications role ranked radio, television, email, search, social media, newsletters, and press to be more important than those who do not have a formal communications role (Figure 4.16). Organizations without a formal communications role found person to person, podcasts, and print to be more important than organizations with a formal communications role. These results speak to the expertise of a dedicated communications person on staff.

Formal Comms Role	Person to person	Radio	Podcasts	Television	Email	Paid Search / Search Engine Optimization	Social Media	Print (i.e. Newspapers, Magazines)	Newsletters	Press/Media
Yes	3.73	1.67	1.27	1.93	4.00	2.13	3.80	2.67	3.67	3.47
No	3.89	1.39	1.56	1.50	3.83	1.94	3.67	3.06	3.28	2.94

Table 4.15 Method of Communication by Formal Communications Role (Mean Scores on a Scale of 1-4).

Social Media Types

Looking at social media specifically, Snapchat and TikTok were the least important platforms across the board while Facebook was the most important (Table

4.16). In a 2023 study, Facebook was identified as the second highest used social media platform by adults, with 68% indicating they use the platform, only behind YouTube.⁹⁵ The data shows that nonprofits are following social media patterns by utilizing Facebook for its extended reach. As indicated in the interviews, a few organizations are interested in distributing content on YouTube, but budget, time, staff, and content limitations prevent widespread use of this platform. While LinkedIn ranks low amongst all respondents, one of the interviewees noted that LinkedIn has become a platform they would like to prioritize in the future to tap into the professional preservation network and encourage conversation around important topics. They have found that advocacy efforts on LinkedIn has produced engagement on the platform and provide the opportunity to establish themselves as a voice in national conversations about preservation.

Facebook	Instagram	Twitter/X	LinkedIn	TikTok	YouTube	Snapchat
3.65	3.41	1.47	1.53	1.21	2.29	1.06

Table 4.16 Overall Mean Ranking of Importance for Social Media Platforms (Mean Scores on a Scale of 1-4).

For organizations with Larger budgets, Instagram, LinkedIn, and YouTube were ranked higher in important compared to Smaller budget respondents (Table 4.17). This could be an indication that a higher budget allows for the usage of additional social media platforms. Facebook was ranked higher in importance as a social media platform for Smaller organizations. During the follow-up interviews, a couple of the organizations

⁹⁵ Jeffrey Gottfried, *Americans' Social Media Use* (Washington, D.C.: Pew Research Center, 2024), https://www.pewresearch.org/internet/wp-content/uploads/sites/9/2024/01/PI_2024.01.31_Social-Media-use_report.pdf.

indicated that Facebook was the easiest platform to use for the staff and generally the platform their audience preferred.

Annual Operating Budget	Facebook	Instagram	Twitter/X	LinkedIn	TikTok	YouTube	Snapchat
<\$1M	3.68	3.23	1.32	1.36	1.27	2.09	1.09
>\$1M	3.58	3.75	1.75	1.83	1.08	2.67	1.00

Table 4.17 Social Media Platform Importance by Budget (Mean Scores on a Scale of 1-4).

Southeast organizations ranked Facebook, Instagram, and X (formerly Twitter) higher compared to the Northeast, who prioritizes LinkedIn and YouTube (Table 4.18). Notably, Facebook is ranked as “Extremely Important” for the Southeast. LinkedIn and YouTube are platforms that require content which takes additional time and effort to develop including video, which can often be a hinderance to historic preservation nonprofits.

Geography	Facebook	Instagram	Twitter/X	LinkedIn	TikTok	YouTube	Snapchat
Northeast	3.37	3.11	1.32	1.63	1.21	2.42	1.05
Southeast	4.00	3.80	1.67	1.40	1.20	2.13	1.07

Table 4.18 Social Media Platform Importance by Region (Mean Scores on a Scale of 1-4).

For organizations that have a formal communications role, all but two social media platforms ranked higher in importance compared to those that do not have a specific role (Table 4.19). The two that were slightly less important to organizations with a communications role were LinkedIn and Snapchat; it was a nominal difference as they were of low importance to all respondents. This matched expectations; however, it was anticipated that the disparity between averages would be greater. This data supports the

trend that organizations that have a communications role see higher rankings for communication tactics compared to those without a specific position.

Formal Comms Role	Facebook	Instagram	Twitter/X	LinkedIn	TikTok	YouTube	Snapchat
Yes	3.73	3.87	1.87	1.53	1.33	2.40	1.00
No	3.61	3.06	1.17	1.56	1.11	2.28	1.11

Table 4.19 Social Media Platform Importance by Communications Role (Mean Scores on a Scale of 1-4).

Audience Size Range

The literature examined for this research stressed the importance of audiences within communication strategies, specifically for nonprofits that have multiple constituent groups. Audience targeting provides a way to reach the right audience at the right time and place based on business objectives.

Respondents were asked to estimate the total audience reached with their communication, including membership, targeted public outreach, and members of public, to evaluate the size of the organizations. Audience sizes range from 200 to 500,000, with 71% of respondents indicating their audience size is below 15,000 people. For the 29% of the organizations with an audience size above 15,000, the audience sizes were very disparate with one-to-two respondents in each 5,000 range between 15,000 and 500,000 (seen in the Figure 4.22). To provide an equitable analysis of the audience ranges, Figure 4.23 includes an overflow bin to house those with an audience over 15,000 into one category; future comparisons will be made based on this categorization.

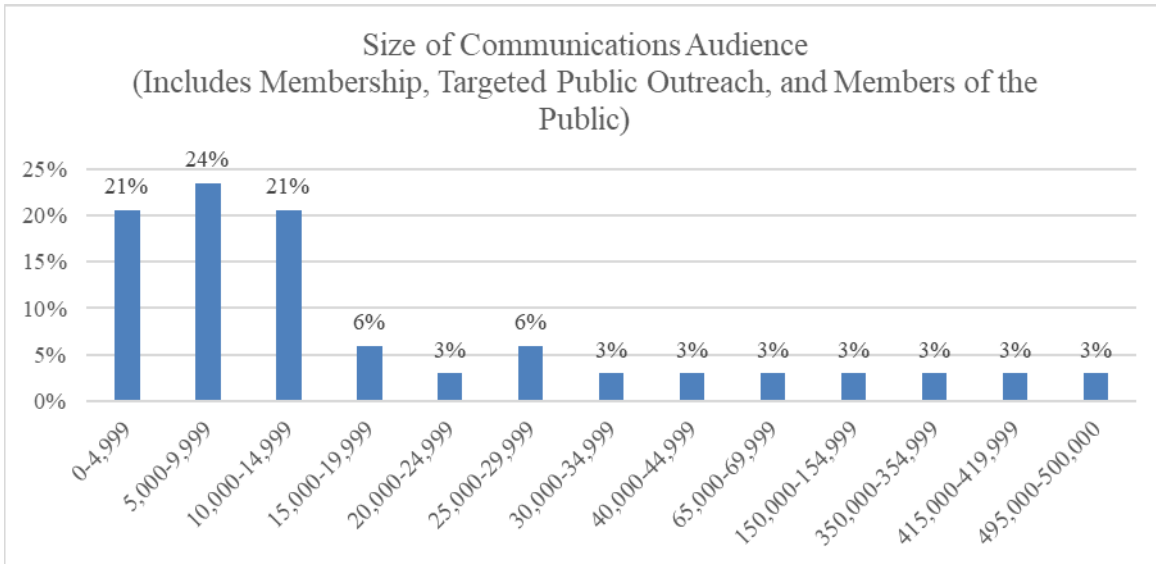


Figure 4.22 Size of Communications Audience.

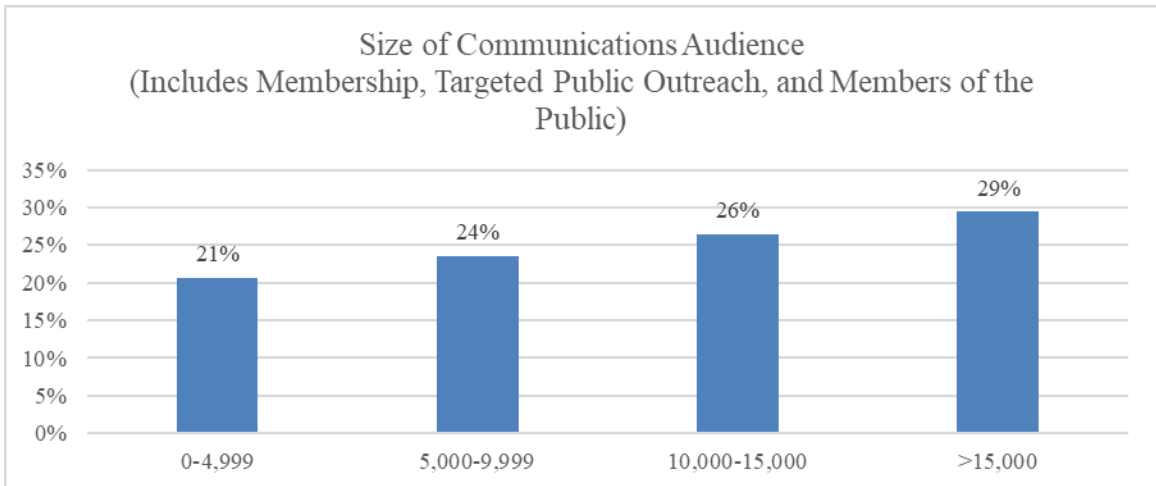


Figure 4.23 Size of Communications Audience, Grouped.

Budget clearly has an impact on audience size, as 50% of organizations with a Larger budget have an audience greater than 15,000, whereas only 80% of Smaller budget have an audience less than 15,000 (Figure 4.24 and Figure 4.25).

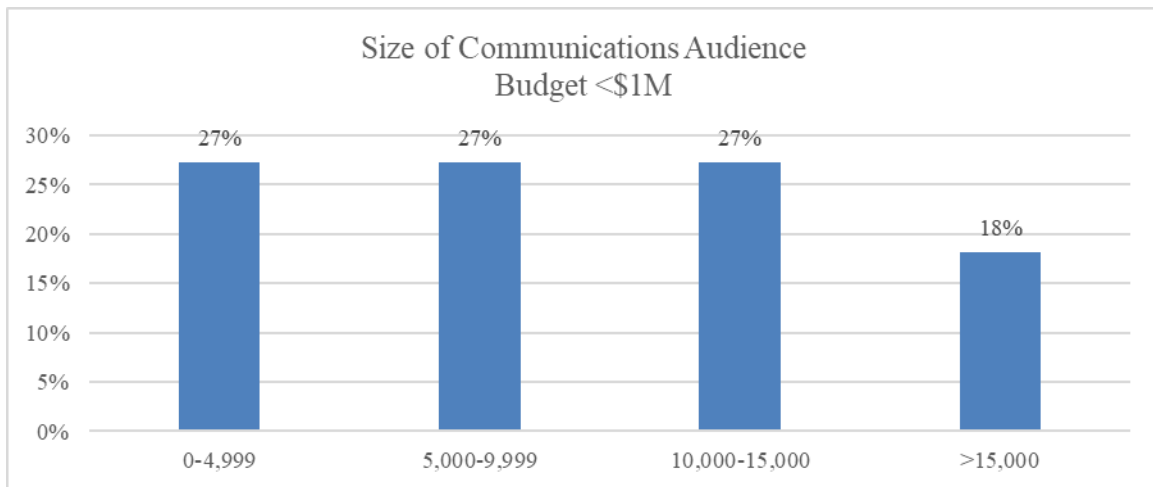


Figure 4.24 Size of Communications Audience for Organizations with Budget <\$1 million.

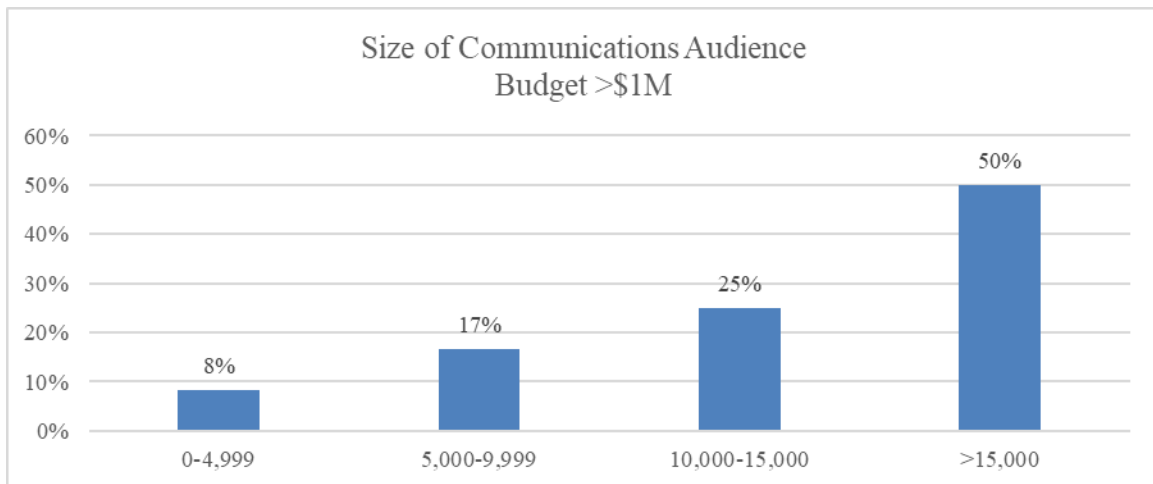


Figure 4.25 Size of Communications Audience for Organizations with Budget >\$1 million.

Geographic region does not show a consistent trend for audience size; 60% of organizations in the Southeast have an audience over 15,000, with an equal

distribution across the remaining three ranges (Figure 4.27) while the Northeast has a reasonably equitable distribution across all ranges (Figure 4.26).

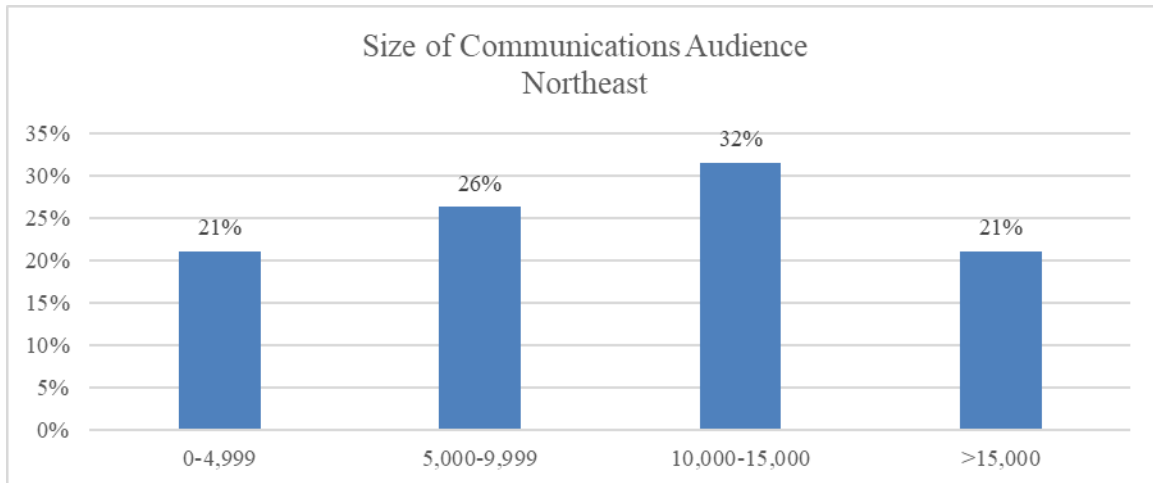


Figure 4.26 Size of Communications Audience for Organizations in Northeast.

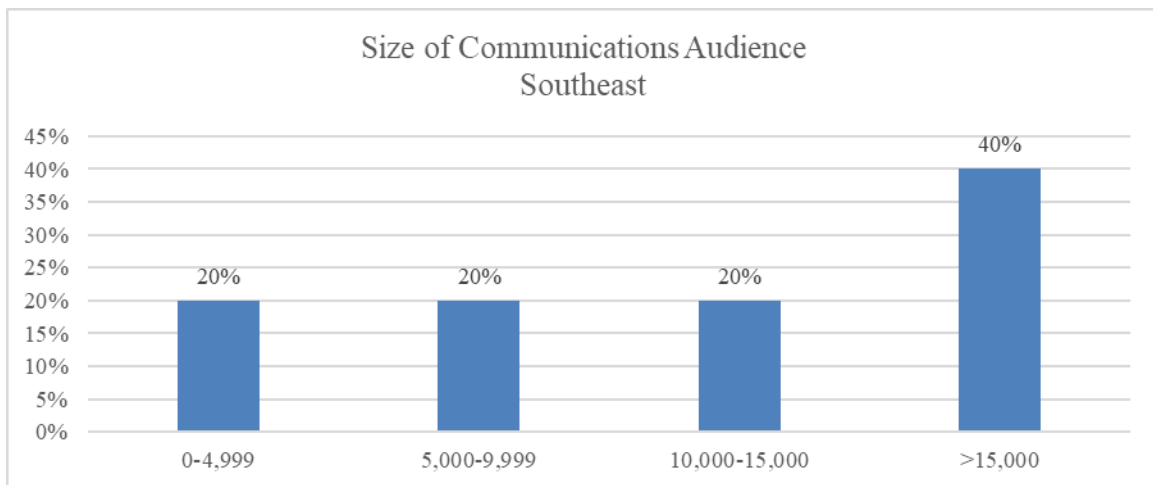


Figure 4.27 Size of Communications Audience for Organizations in Southeast.

There is also a correlation between audience size and having a formal communications role (Figure 4.28 and Figure 4.29). Seventy-three percent of organizations with a formal communications role have an audience above 10,000 compared to 45% of those without. Additionally, no organization with a formal

communications role has an audience size under 5,000, while 33% of organizations without a formal communications role do. This data shows that a staff member focused on communication can drive increased audience reach. With a larger audience, the nonprofit can extend their reach and engage a greater good with their mission, ideally targeting audiences with communication based on their interests.

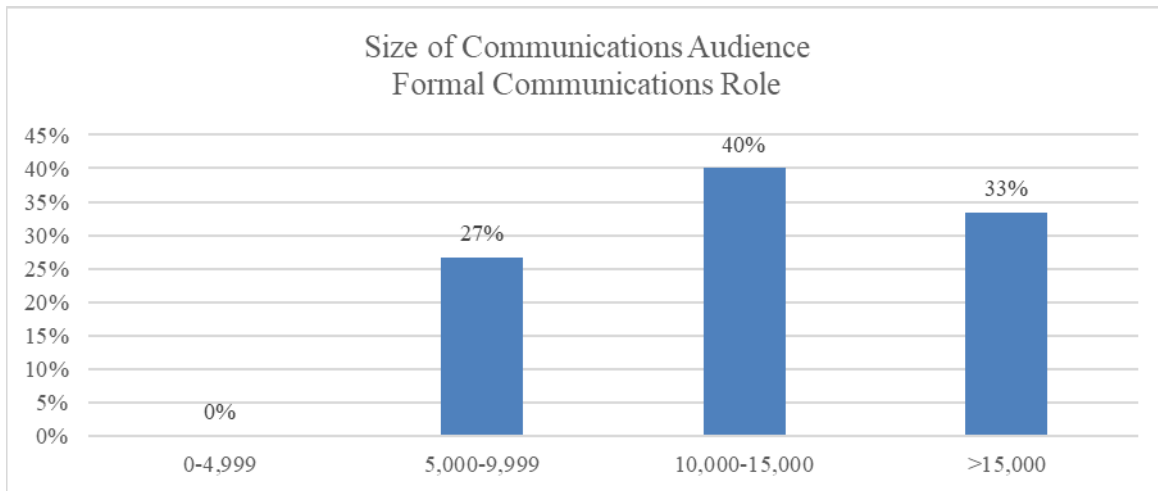


Figure 4.28 Size of Communications Audience for Organizations with a Formal Communications Role.

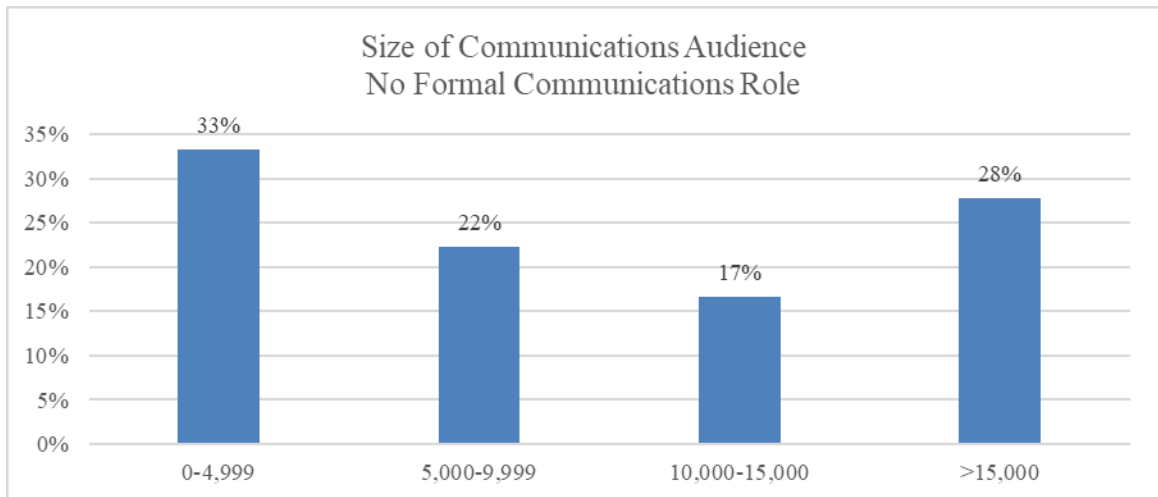


Figure 4.29 Size of Communications Audience for Organizations without a Formal Communications Role.

Target Constituent Groups

Breaking down the overall target audience into constituent groups, respondents were asked to estimate the percentage of their audience that falls into registered members, non-member professionals, and non-member public. Figure 4.30 below reflects the full sample average amongst all respondents. On average, the non-member public audience is overwhelmingly the highest percentage of the overall constituency, reflecting 59% of the target audience organizations are trying reach, likely with the goal to convert them to members.

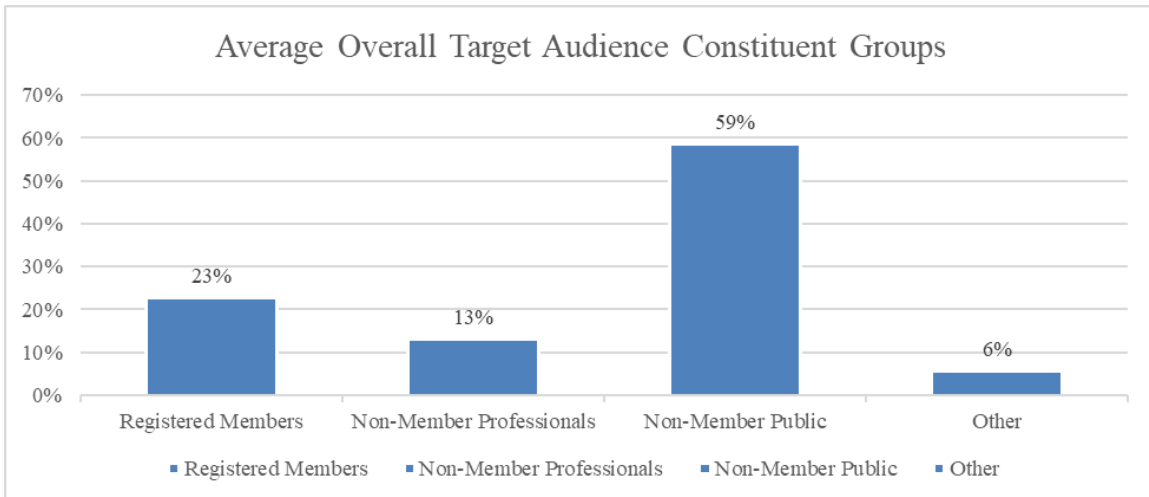


Figure 4.30 Average Target Audience Constituent Groups.

Evaluating the difference by organization budget size shows Larger budgets can afford to reach an increased percentage of the non-member public with their communication, whereas Smaller budget organizations focus their efforts on their registered members (Figure 4.31). Organizations with Larger budgets have, on average, a higher percentage their audience within non-member professionals. When comparing the average membership size for the two budget groupings, Larger budgets have an average

of 1,806 members whereas organizations with a Smaller budget have an average membership of 325 people. Smaller organizations rely on members for funding as compared to Larger organizations as previously noted.

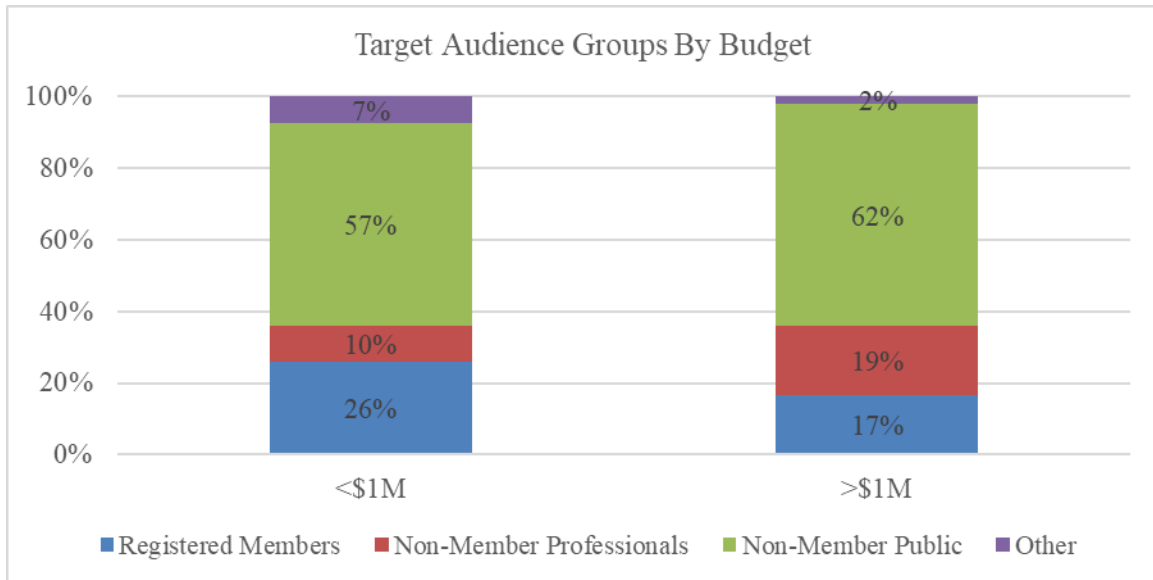


Figure 4.31 Audience Constituent Groups for Organizations by Annual Budget.

As seen in Figure 4.32, organizations in the Southeast have a higher percentage of the non-member public within their audience. Conversely, the Northeast nonprofits place a higher importance on reaching non-member professionals and registered members. In a previous question, when asked how operational funds are garnered, Southeast organizations ranked membership fees higher than the Northeast, contradicting the results here. This likely proves that the Southeast are targeting non-members to increase their membership pool.

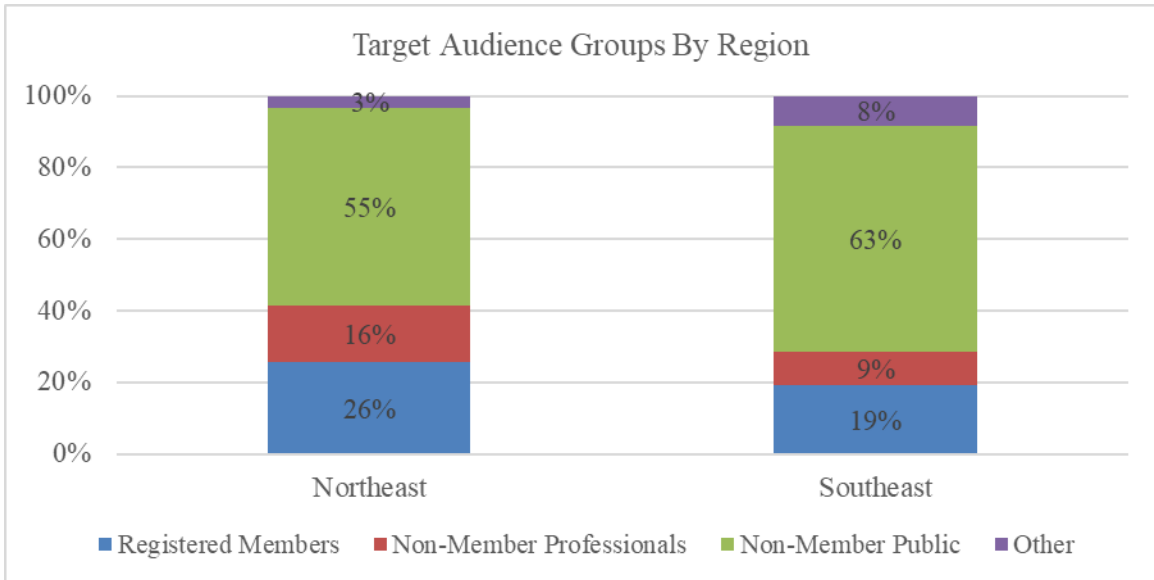


Figure 4.32 Audience Constituent Groups for Organizations by Region.

When asked to break down the total target audience into constituent groups, respondents with a formal communications role placed more emphasis on non-member professionals, 17% of the total audience, compared to respondents without a formal communications role at 11% (Figure 4.33). Organizations without a communication staff member focus 28% of their outreach to registered members. This reflects the notion that a communications role focuses on increasing membership by reaching non-member audiences, similar to the comparisons between budget ranges in Figure 4.31.

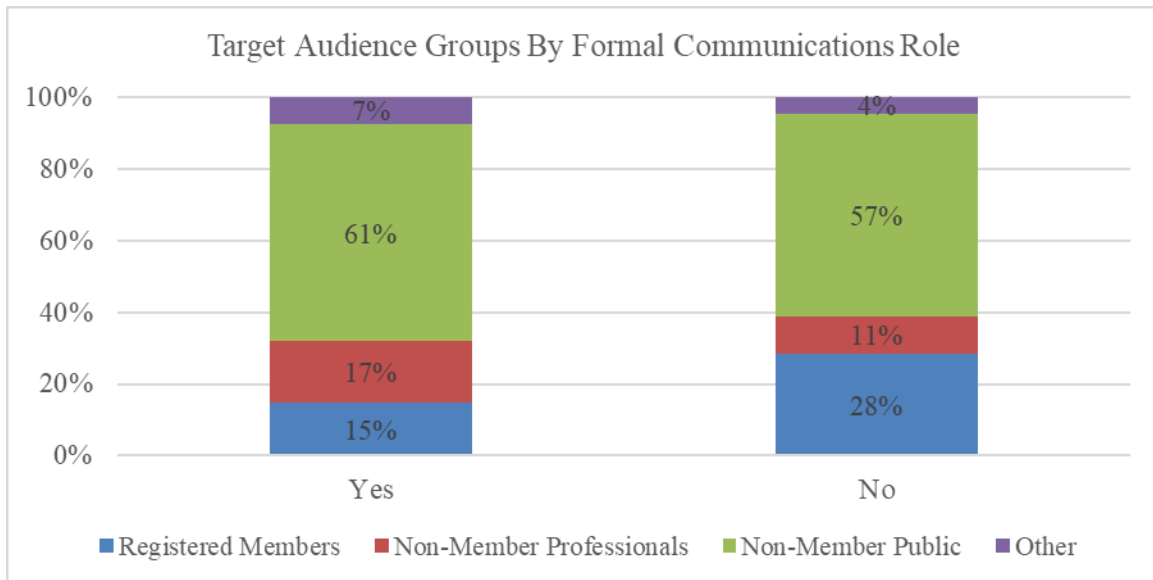


Figure 4.33 Audience Constituent Groups for Organizations by Formal Communications Role.

Audience Segmenting Strategies

As noted in the literature review, effective communication strategies include identifying and targeting key audiences based on their needs, attitudes, and consumption habits. Research is key to identifying the ways in which to segment audiences based on the goals of the organization.⁹⁶

Forty-four percent of respondents indicated they are delivering specific messaging to specific audiences. When evaluating by budget ranges, 58% of Larger organizations confirmed they are delivering specific messages to specific audiences, compared to only 36% for Smaller budgets (Figure 4.34). A Larger budget provides the nonprofits the opportunity to create additional content and be more specialized in their communication approaches.

⁹⁶ Tschirhart and Bielefeld, *Managing Nonprofit Organizations*, 172.

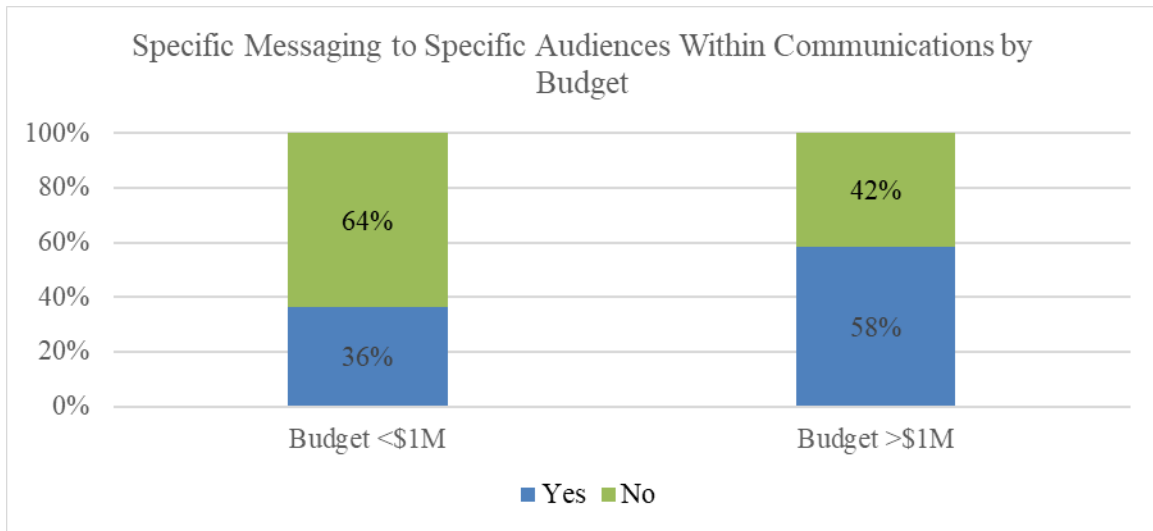


Figure 4.34 Specific Messaging for Audiences within Communication Efforts by Budget.

Figure 4.35 shows the regional breakout of communication, which produced similar results. This shows regionality does not impact strategies surrounding specific messaging to target audiences. During an interview with a small-staffed, lower budget, city-focused organization in the Northeast, the interviewee highlighted the need to expand their reach outside of the immediate community in order to expand their programming. During the height of Covid, organization G developed virtual programming and targeted people outside of the community that had interest in the programming as well as people that formerly lived in the city. They were one of the first organizations in their community to execute a large fundraising event in this manner, expanding their reach and audience outside of their typical audience.

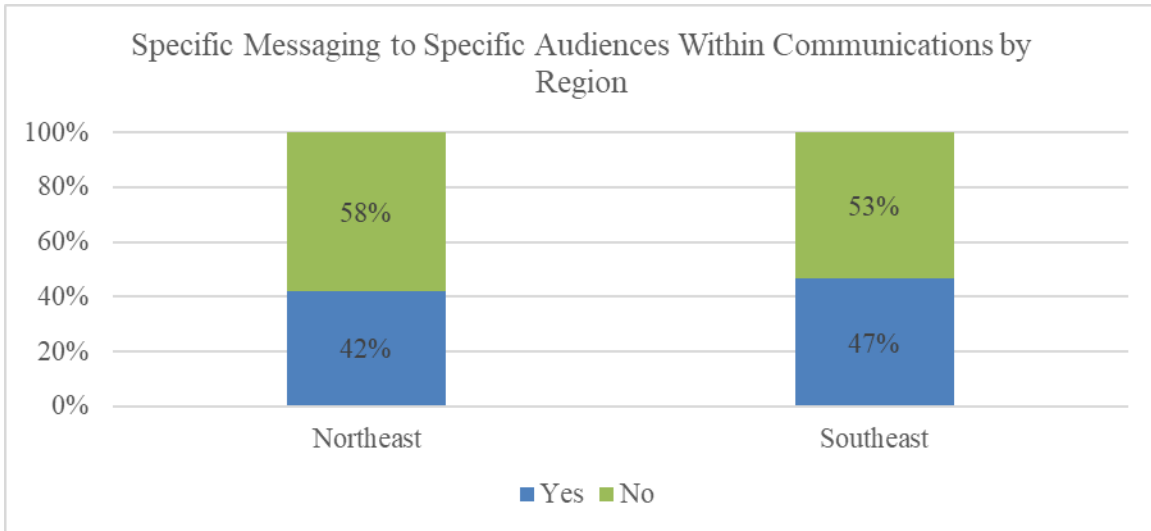


Figure 4.35 Specific Messaging for Audiences within Communication Efforts by Region.

Having a formal communications role does impact the ways in which the nonprofits are delivering their communication messages to target audiences. Fifty-three percent of the respondents with a communications role are delivering specific creative messages based on the audiences reached, whereas only 33% of those without a formal communications role do so (Figure 4.36), proving the effectiveness of having a communications staff member against strategic approaches.

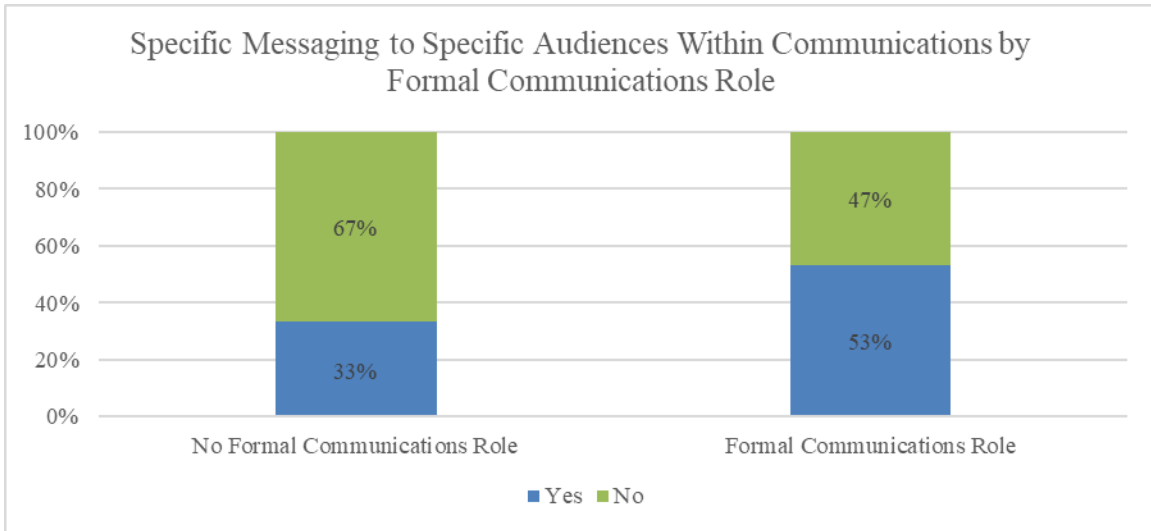


Figure 4.36 Specific Messaging for Audiences within Communication Efforts by Formal Communications Role.

The next question, delivered only to those who indicated “Yes” to the question about delivering specific messaging to specific audiences, asked how the nonprofit was segmenting their audience to deliver curated messaging, with the option to choose all that applied. There were a total of 28 selections from the 15 respondents; the bar chart below reflects the percentage of each answer against the total 28 (Figure 4.37). Half of the responses indicated the organization creates specific messages for members vs. non-members. The assumption is that non-members are likely receiving communication regarding becoming a member, whereas members are targeted with information regarding member specific opportunities. Geography was another popular choice with 29%. It is interesting to note that age only reflects 4% of the number of responses considering many of the organizations indicated they wanted to reach younger audiences in a future question. The desires of the organization from an audience targeting perspective do not align with the actions. Also notable is that areas of preservation, such as interest in the

subject matter and organization engagement, are not ways in which the nonprofits are segmenting their audience. Future research to understand how organizations are strategically planning communication to target young professionals could potentially provide insight into how organizations are attempting to accomplish this effort, if not segmenting communication.

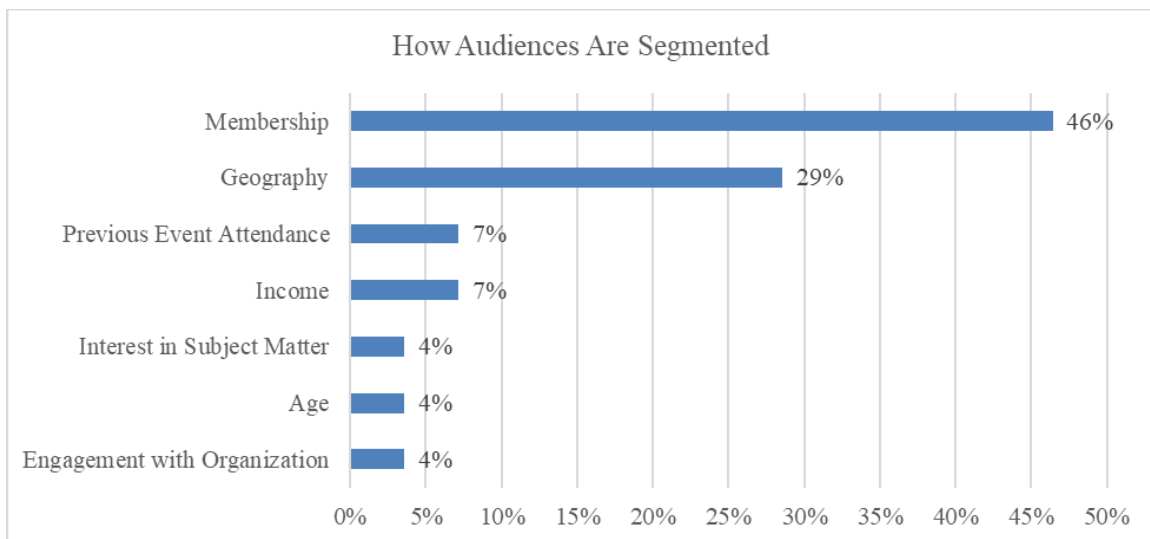


Figure 4.37 Ways in Which Audiences Are Segmented for Communication (Response Percentages of the Sample).

Respondents were also asked to name their top three audiences in their own words in a free field question to determine if there were any audiences not included in previous questions. These answers were then grouped and categorized to a consistent naming method to present the data. The resulting responses reflect a wide range of audience categories, which speaks to the variability and individuality to each of the responding organizations. There is not a one size fits all approach to audience generation in historic preservation nonprofits.

Members and Local Residents/Community Members were the most popular audiences the respondents want to reach with their communication, reflecting 30% of the responses (Figure 4.38). General Public, History Enthusiasts, Preservation Professionals, and Potential Members were also top categories, reflecting 22% of the total responses. A few organizations listed very specific audiences including Retired Individuals, Foodies, Opinion Leaders & Decision Makers, and Students as audiences they would like to reach, reflective of their organization’s goals. Similar to audience segmentation, the top audiences the organizations are trying to reach do not align with the younger demographic or donors despite their desire to engage these groups of people.

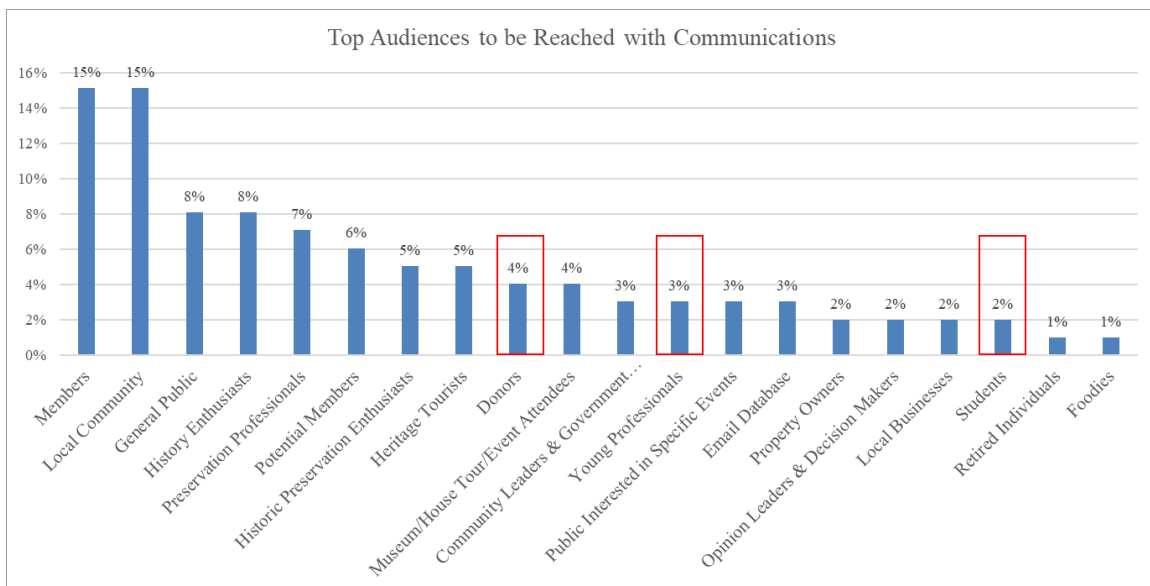


Figure 4.38 Top Goal Audiences For Communications.

The survey asked if there is an audience the respondent wished they could reach that they are not currently; 64% answered “Yes”. When distilled down to commonalities, the most common untapped audiences are Young Professionals and High Net Worth Donors (Figure 4.39). These answers were particularly popular amongst the small

organizations. The follow-up interviews also called out the desire to engage younger audiences, but most of the organizations state time, staff, and budget as limitations to expand audience reach.

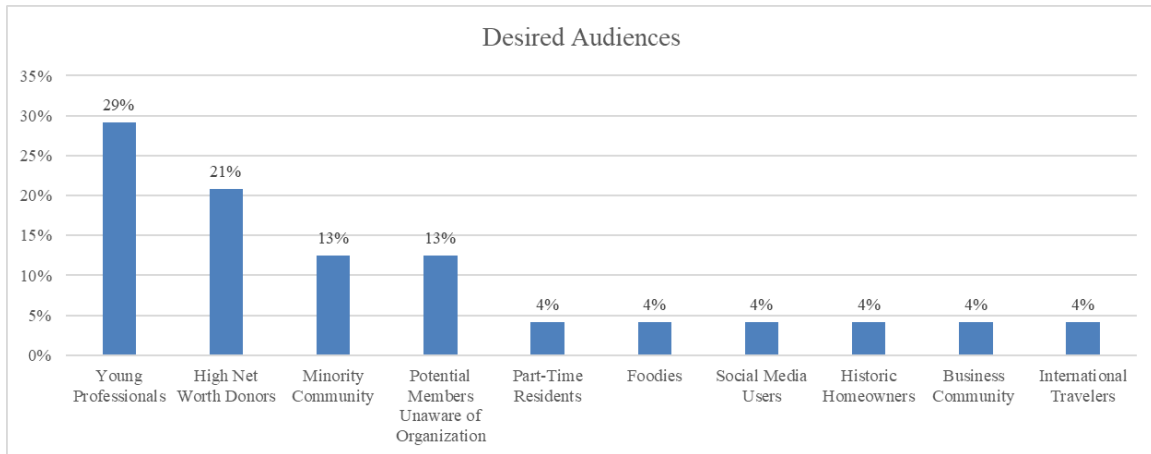


Figure 4.39 Desired Audiences.

Communication Planning

To understand the frequency with which the participating nonprofits are evaluating their strategies, the survey asked how often communication planning takes place. Half the respondents noted they plan on an as-needed basis; in a free form follow up question asking for elaboration, most indicated this is based on the frequency with which programs are planned (Figure 4.40).

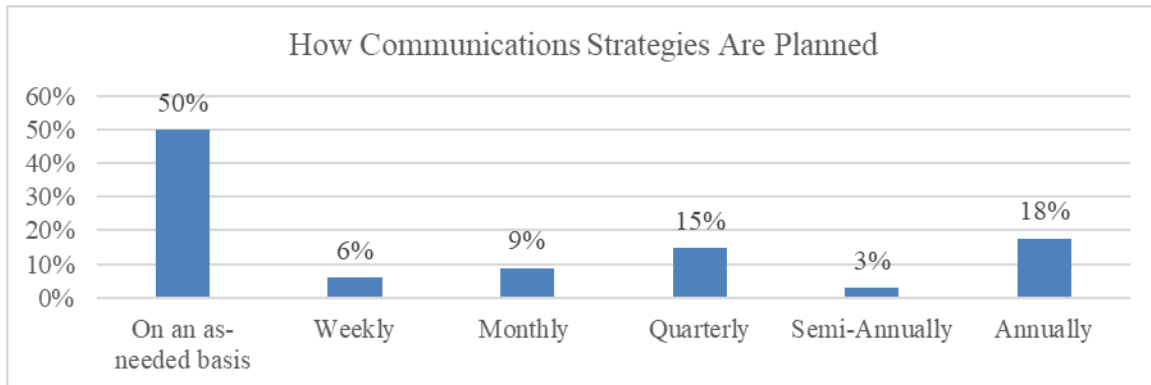


Figure 4.40 How Often Communications Strategies Are Planned.

Seventy-three percent of the organizations with Smaller budgets tend to plan on an as-needed basis whereas Larger budgets plan ahead, the majority indicating annually or quarterly (Figure 4.41).

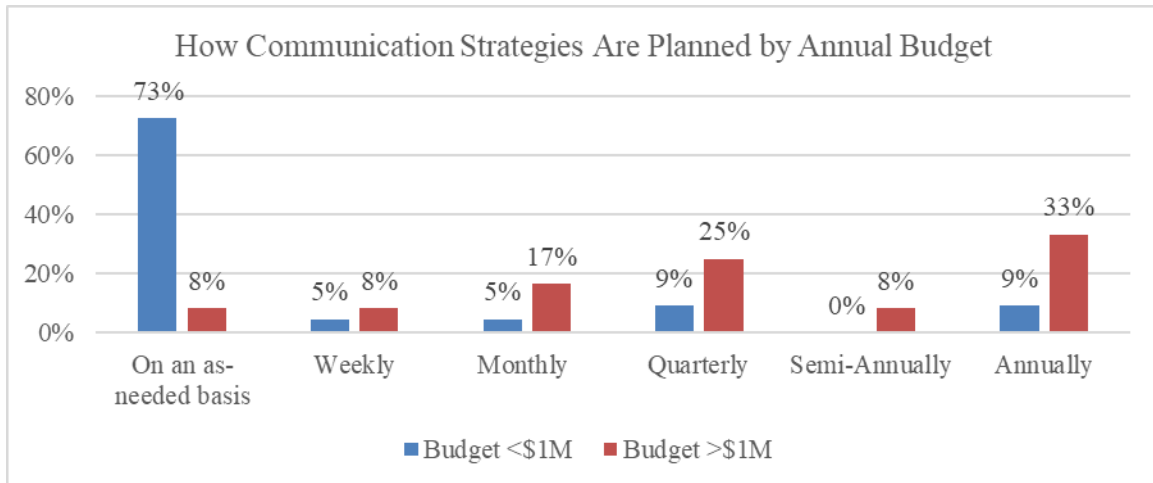


Figure 4.41 How Often Communication Strategies Are Planned by Budget.

There was limited consistency in planning when evaluating based on geography as seen in Figure 4.42. Sixty-seven percent of the Southeast plan on an as-needed basis, reflecting limited upfront planning for communication. However, 13% plan quarterly, 7% semi-annually, and 13% annually, indicating the remaining 33% are considering their communication efforts ahead of time. The Northeast has a more equitable distribution across all time frames with less consistency of planning in the region.

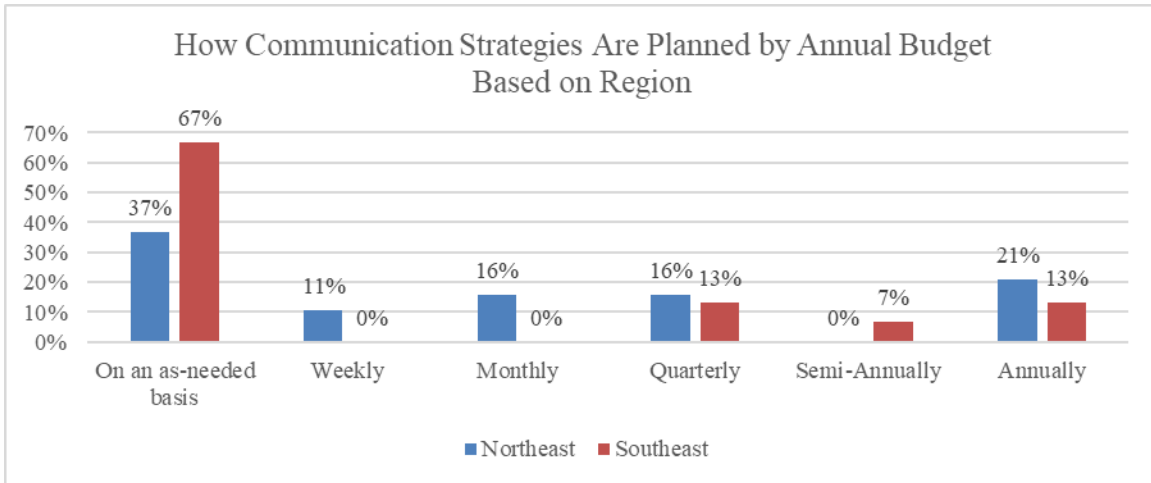


Figure 4.42 How Often Communication Strategies Are Planned by Region.

Of the organizations without a formal communications role, 67% plan on an as-needed basis (Figure 4.43). The expectation would be that a formal communications role would lead to strategic planning for communication programming, however this data shows less conclusiveness. About one-third of the respondents with a communications role answered they plan on an as-needed basis, followed by quarterly, and then annually. This data shows that having a formal communications role does not necessarily indicate a calculated approach to planning. This could be a result of many factors, such as the frequency with which programs are planned, when advocacy issues arise, and staffing/budget limitations.

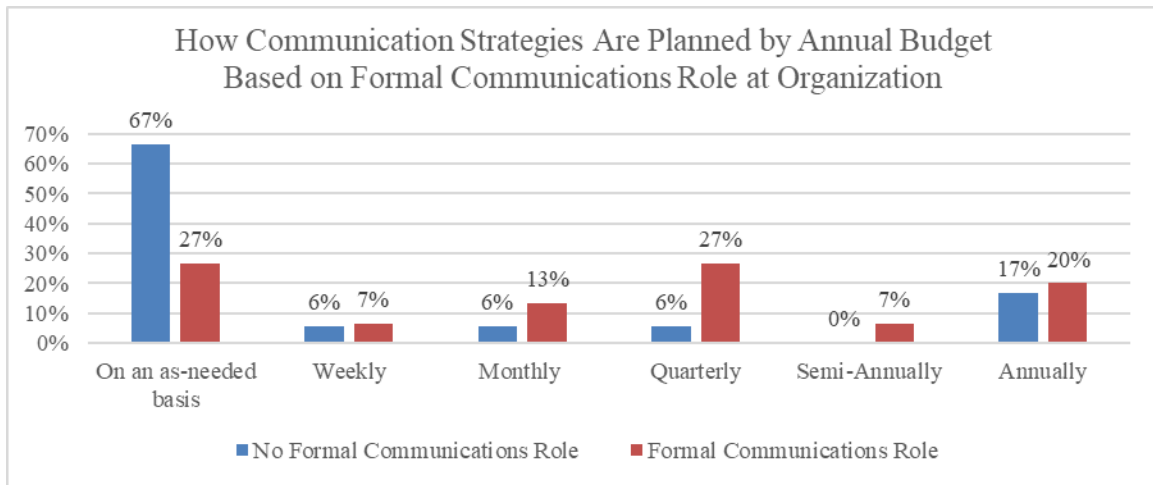


Figure 4.43 How Often Communication Strategies Are Planned By Communications Role.

Resources

Only four respondents indicated there is an industry standard organization or reference used for communication ideas. A few of the resources mentioned include Preservation Maryland, American Alliance of Museums, American Museum Membership Conference, Association of Fundraising Professionals, National Council on Public History, Indiana Landmarks, Atlanta History Center. Other organizations identified during the interviews include Preservation Austin, LA Conservancy, Restore Oregon, and the National Trust for Historic Preservation.

The survey asked if there is a need for more formal literature or training for communication for historic preservation nonprofits; 64% answered yes, 15% indicated no, with the remaining 21% unsure (Figure 4.44). Given the lack of literature and training available, this result is surprising. The expectation was that a higher volume of respondents would have a desire for additional resources.

A subsequent question asked respondents to choose which form of training would be best, including a best practice manual, hands-on workshops, online classes, or all of the above. A best practice resource manual was the top choice with 26%, followed by online classes at 18% (Figure 4.44). During a follow-up interview, one of the respondents mentioned short, on-demand videos would be a helpful resource for historic preservation nonprofits to garner ideas and insights for communication. They suggested a video such as “The Top Ten Takeaways All Relevant Organizations Should Be Aware Of”. Making the video accessible, not behind a paywall, and easy to understand were the keys to success. The respondent noted that including these videos within a library or even on a Facebook page that can be accessed by all would be beneficial.

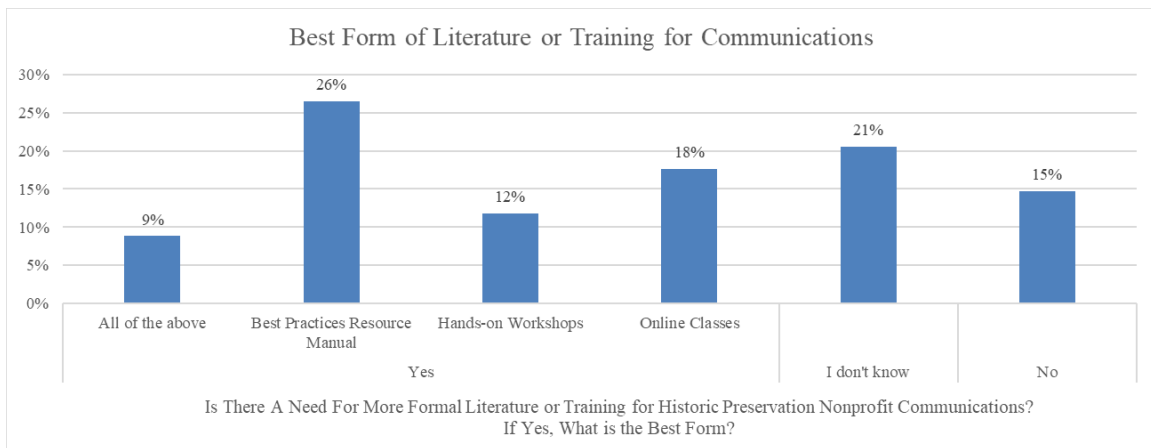


Figure 4.44 Best Form of Training for Communication.

One of the last survey questions asked to identify the biggest challenge to implementing effective communication strategies. The most common responses were restricted budget/funding to adequately support communication, staff availability, and limited time to focus on communication efforts. Another common theme was limited

expertise in communication methods. Another concern is finding a balance between sharing relevant information while also not sending too many communications, especially emails, an important consideration for all communication strategies.

Communication Strategy Assessment

Respondents were asked if and how they quantify the results of their communications; 41% said they do quantify their results, 44% stated they do not quantify their results, and 15% indicated they do not know if they quantify their results. To further compare the results the “I don’t know” responses are removed to only include definitive answers.

Organizations with a Larger budget are more likely to quantify their results as 64% of respondents indicated (Figure 4.45). This is likely attributed to that fact that organizations with a Larger budget have an increased likelihood of having a communication budget to warrant the evaluation of the strategies.

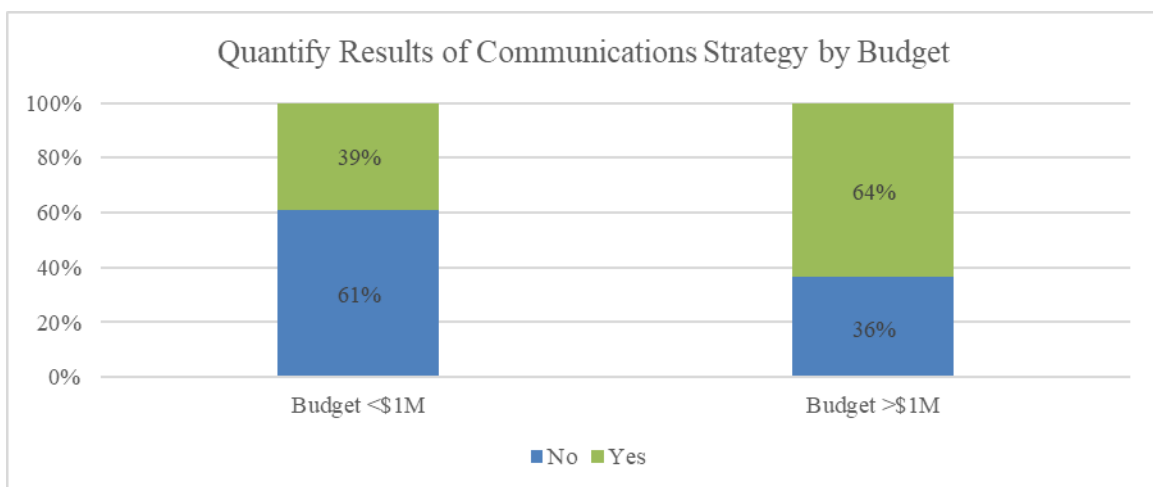


Figure 4.45 Quantify Results of Communication Strategy by Budget.

Geography does not have an impact on the quantification of communication strategies, with both regions close to equally split between yes and no responses (Figure 4.46).

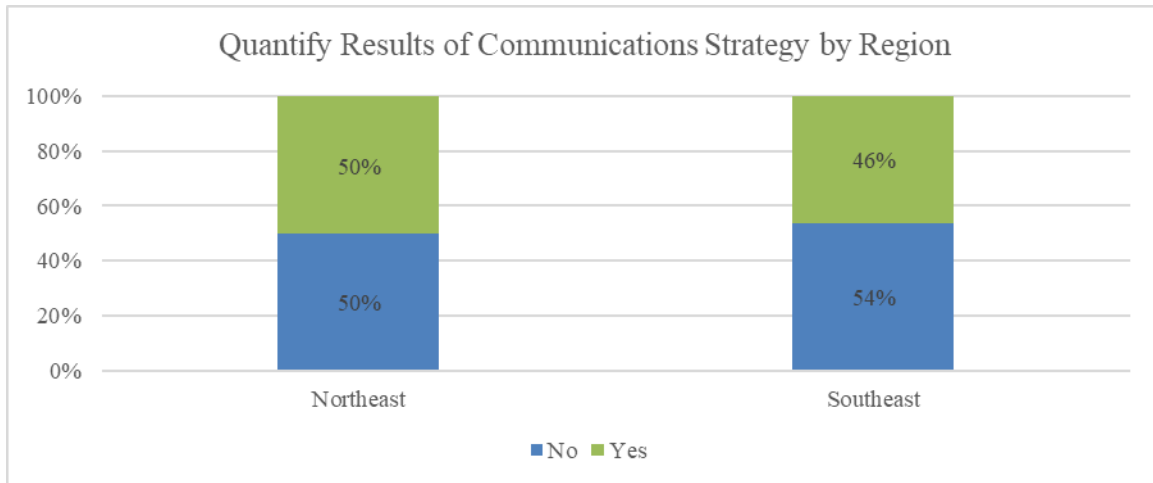


Figure 4.46 Quantify Results of Communications Strategy by Region.

As expected, the respondents with a formal communications role are quantifying the results of their communication strategies compared to organizations without a formal communication person on staff (Figure 4.47). Fifty-seven percent of the organizations with a formal communications role quantify communication results while only 40% of organizations without a communications role do so.

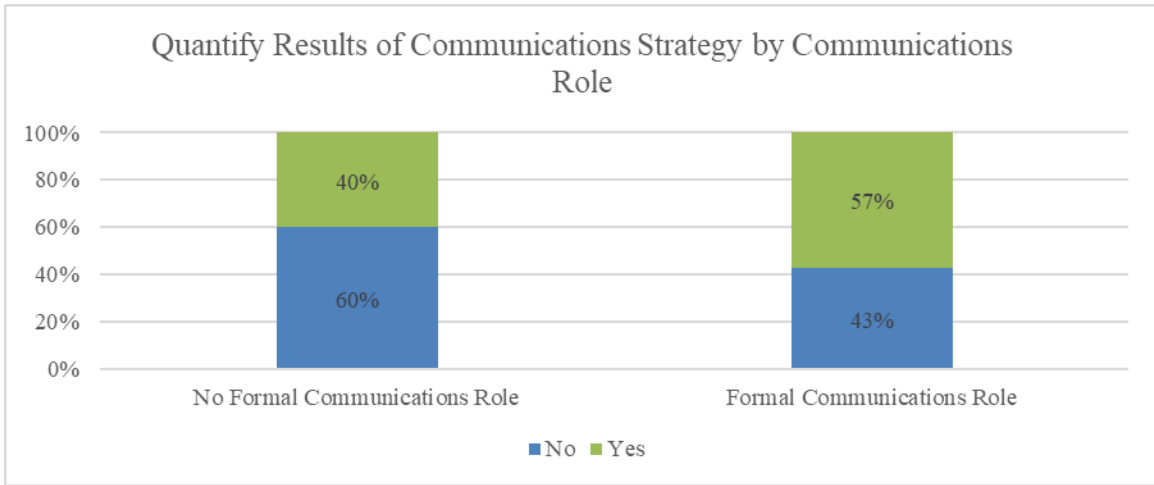


Figure 4.47 Quantify Results of Communications Strategy by Communications Role.

Those who responded “yes” to the quantifying results were then asked to identify the specific metrics they are using (Figure 4.48). The survey provided four options as well as two “other” categories in which respondents could add their own metrics; respondents could choose all options that applied. Additional strategies provided by one large nonprofit include both Advocacy Influence and Earned media. This is the only organization that provided an “other” option fill-in response, an indication of limited measurement variety. A category missed during the development of the survey was website visitation, as discovered during the interviews. Of the options provided, they were ranked similarly amongst all respondents.

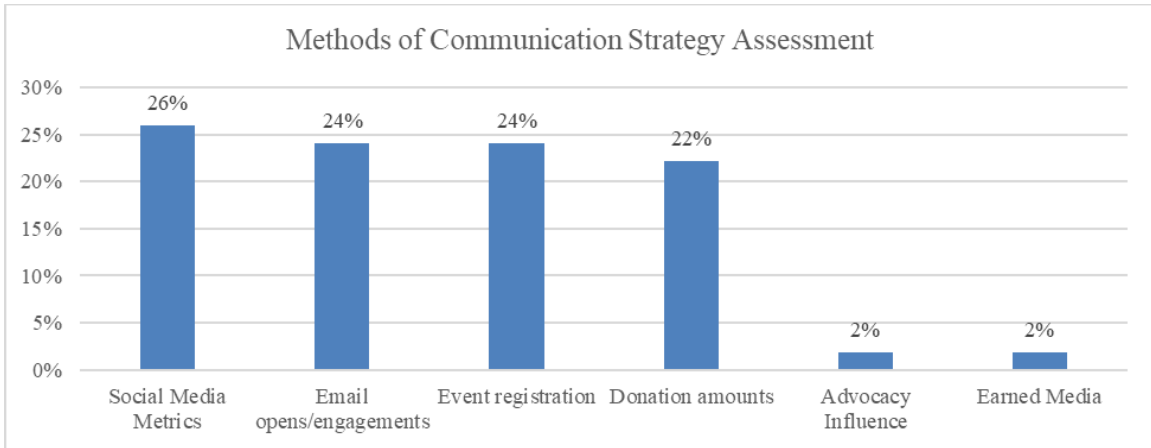


Figure 4.48 Methods of Communication Strategy Assessment.

Social media metrics is the most common way in which historic preservation nonprofits, Smaller and Larger budgets, analyze their communication effectiveness (Figure 4.49). Donations reflect 26% of the responses for Smaller organizations and 19% for Larger. Conversely, donation amounts are more important to Smaller nonprofits whereas event registration is more important to Larger organizations, potentially because they are hosting more events and workshops as indicated in previous questions.

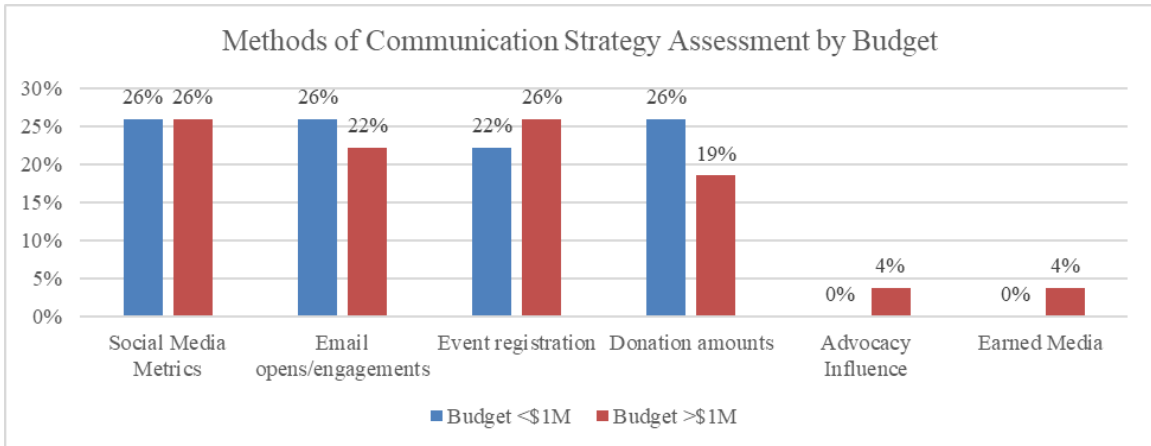


Figure 4.49 Methods of Communication Strategy Assessment by Budget.

Regionally, the Southeast has less emphasis on social media metrics compared to the Northeast (Figure 4.50). This contradicts the previous data that showed the Northeast are more likely to use social media as a form of communication compared to the Southeast, yet the metrics evaluated from the communication are not as prevalent.

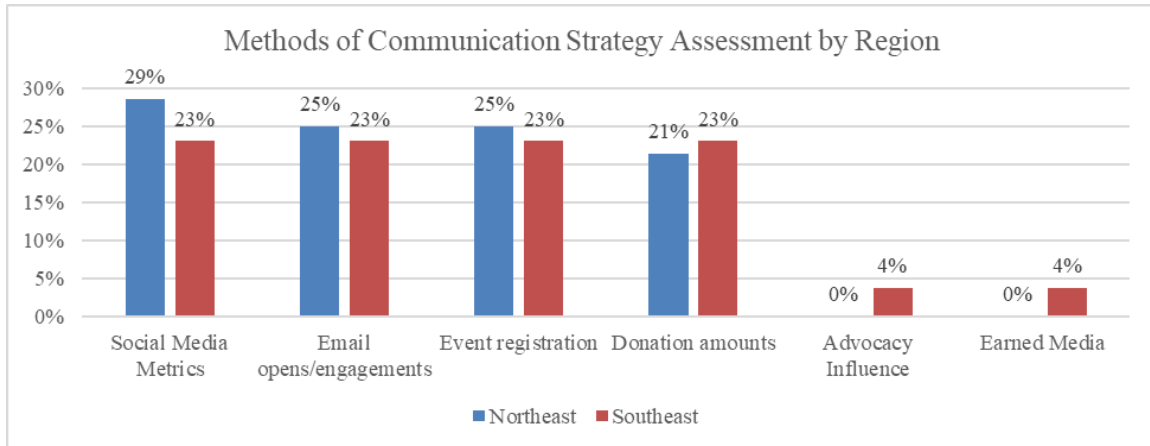


Figure 4.50 Methods of Communication Strategy Assessment by Region.

The presence of a formal communications role does not show a significant change in the ways in which communication strategies are assessed, except with the organization that added advocacy influence and earned media as additional metrics (Figure 4.51). These more sophisticated methods of measurement align with the presence of a communication professional.

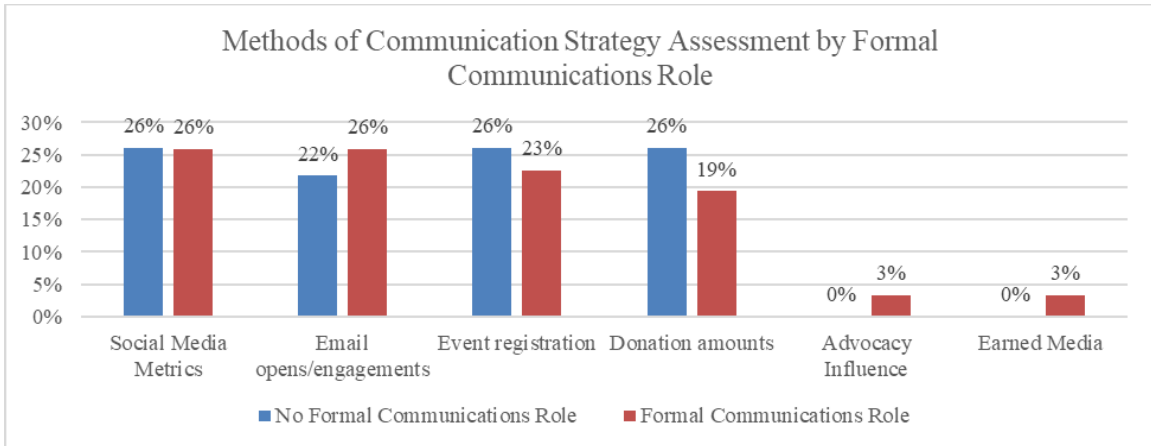


Figure 4.51 Methods of Communication Strategy Assessment by Communications Role.

Communication Trends Discussion

The ten findings below provide an overview of outcomes for this thesis. To provide additional insight and context, information from the follow-up interviews is included alongside the survey results to further support the conclusions from the data analysis and evaluation.

1. This study found that 44% of the surveyed organizations had a formal communications role, and the position was more common in groups with a budget greater than \$1 million. Seventy-five percent of organizations with a budget over \$1 million have a formal communications role versus only 29% with a budget under \$1 million. The presence of a formal communications role showed the greatest impact on communication strategies and methods at these organizations. Organizations with a formal communications role ranked all methods of communication more important than those without, except for Person to Person, Podcasts, and Print.

2. Budget and staffing limitations is the largest roadblock for communication at historic preservation nonprofit organizations. Fifty-nine percent of the responding organizations indicated they have a specific budget for communication, with 90% indicating a communication budget under \$100,000. The data showed limited ranges of communication-specific budgets amongst the respondents. The most popular ways in which the respondents are generating funding for their budgets is through membership fees and donations, ranking the importance 3.26 and 3.85 out of four, respectively. Historic preservation nonprofits often have to find creative ways to generate additional

funding for communication when funds are not specifically carved out, or when the budget does not cover the planned initiatives.

Organization E is a large staff, large budget Southeastern organization with both a communication budget and communication staff person. They noted the need to supplement their communication budget to support programming. They have an integrated marketing plan that includes print, social media, email, public relations, paid advertising, and website. Even through this nonprofit has a budget for paid marketing efforts, they still have a gap in funding programming and trade in-kind advertising with other businesses. They leverage the marketing benefits of other entities and trade event space in exchange for the value of the benefits in advertising space in newspapers, on billboards, and within digital newsletters. The nonprofit also receives a one-to-one match in tourism advertising dollars from their state parks, recreation, and tourism department by using their communication to reach outside of the city to increase tourism.

An interesting consideration proposed during an interview was for the development of grants specific to support communication at historic preservation nonprofits. These grants could be used to analyze paid advertising against organic support, fund the development of a robust website, or create new content, including professional level video. These grants would not have to be large as noted by the interviewee, as \$5,000 can go farther in paid advertising compared to the rehabilitation of a building.

3. A background education in communication does not appear to have an effect on communication strategies. Only 24% of respondents have an education in

communication and when comparing educational background with organization demographics, there were mixed results. Organizations with a Smaller budget had more respondents with a communication education. However, Larger budget organizations might have determined these preferences and hired outside personnel to execute. Additional research would need to be conducted.

4. Regionality does not have consistent implications on communication strategies within the responding organizations. In some instances, there was a clear correlation between data, such as with an education in communication, methods of generating funds, and the ranking of communication strategies. However, there were other areas in which regionality was not consistent, such as audience targeting and quantifying communication results.

5. The presence and size of a Board did not show trends within communication tactics. All but one responding nonprofit had a board; 70% have between five and 20 board members. When asked if the board advises on communication, 58% of respondents said their board does assist with communication. The follow-up interviews provided additional context to board involvement. Organization D, a small nonprofit in the Southeast that does not have a budget or staff position for communication, indicated they rely on the connections and ideas from the board. Many board members are closely involved with local communities and use their relationships to assist the nonprofit with communication efforts. All the board members grew up in the small community and they share information through word of mouth within their local neighborhoods. They also

leverage their connections to print newsletters and engage with local news stations through board connections, further extending their communication reach.

6. Respondents similarly scored the importance of various forms of communication, although Email, Person to Person, and Social Media ranked the highest amongst all respondents. Of the comparison points studied in this research, budget level had no bearing on communication method. However, geography and the presence of a communications role showed trends amongst forms of communication. Regionally, the Southeast ranked all methods of communication higher compared to the Northeast. Email and Social Media ranked more important for those with a formal communications role, and Person to Person ranked higher for those without.

In the interviews, multiple organizations noted their constituents can be found, and are easy to reach, on social media platforms, specifically Facebook. Social media is a relatively simple and free method to get messages across, especially about upcoming events.

Many nonprofits were in good standing with their local newspapers, with some interviewees even writing monthly columns to drive interest and engagement in preservation issues in their community. Organization C, a small community-focused nonprofit in the Northeast, does not have communication funds and relies heavily on free methods of communication, particularly their email newsletter. They are strategic in their delivery, distributing their email weekly during the tourist season and about once a month for the rest of the year.

Despite low priority across the board, Google paid search offers a unique opportunity to nonprofits. In organization I's interview, they noted that Google offers Ad Grants for nonprofit organizations, which provides \$10,000 of advertising every month for text ads within Google Search. This can drive awareness and attract donations. Podcasts are another method of communication that ranked low amongst all respondents.

Organization D noted during their interview that they embraced podcasts during Covid. They converted existing recordings of oral histories into podcasts to continue to connect with the community. While this technology was a learning curve for the older audience, it was very positively received, resulting in additional donations.

Organization E noted they evaluate their communication to account for low performance metrics or the inability to measure the effectiveness of certain forms of communication. In a program they are repeating, they decided to remove television as a tactic due to the inability to determine success. This could be a reason that both Television and Radio ranked very low for importance and likelihood to communicate. In the future, organizations should plan to allocate more time and resources to analyze which parts of communication and advertising are effective in audience reach to help nonprofits better prioritize budgets.

7. Young Professionals and High Net Worth Donors are key audiences that nonprofits would like to reach with their communications, but the responding nonprofits are not currently engaging. The survey data showed these audiences are not the top audiences for communication, nor are nonprofits segmenting their audiences by age or income. During an interview with organization F, a state nonprofit with a large

operating budget, but a small staff, they noted segmenting target audiences is a never-ending struggle as they are constantly trying to reach new people. To attract new audiences, organization F is reevaluating their programming through the intersection of other interests, such as art and architecture, to ensure it aligns with both the general public and preservation minded individuals.

8. Organizations with Larger budgets tend to plan on a more consistent basis, indicating they review their communication strategies annually or quarterly. Fifty percent of the responding organizations are planning their communication strategies on an as-needed basis compared to evaluating on a consistent calendar basis. Evaluating communication strategies based on organizational and media metrics on a regimented basis is important for all types of business, including historic preservation nonprofits. As noted in the literature review, much of for-profit communication relies on marketing where long-range planning is feasible. Due to the nature of the organization, nonprofits generally plan as needs arise.

Organization F's interview, a Larger budget state nonprofit, highlighted a case study in which evaluating their methods of communication proved to be beneficial. Historically, the nonprofit would design, print, and mail four newsletters each year, one being the comprehensive annual report. During Covid, they stopped printing the three non-annual report newsletters and converted the content to their website for cost savings. They did not see a decrease in membership or donations because of this change and provided a savings benefit. While reducing physical mailing publications might not work

for all historic preservation nonprofits, the opportunity to reevaluate strategies is an important consideration to manage limited funds.

9. Social media metrics are the most common way in which the responding historic preservation nonprofits analyze their communication effectiveness, reflecting 26% of responses. Email engagements (24%) and event registrations (24%) are also key methods organizations use to evaluate their communication.

As discussed in the interview with organization G, a Small budget, Northeast city nonprofit, a unique way in which they measure effectiveness of their advocacy communication is to ask members to submit comments for design review board meetings. They quantify the number of comments as a measurement of success of driving awareness of issues in the community.

The interview with organization E noted they are moving away from communication tactics that are unable to provide performance metrics rooted in data, such as television. This could be an indicator supporting the low mean ranking of importance for television for respondents. An overall performance limitation they identified was the inability to track and attribute website visits and engagements with communication. This inhibits the organization from analyzing which form of communication is driving website visits or event sign ups to help prioritize their communication budget within tactics that are delivering data driven results.

10. Training and resources used for communication ideas are respondent specific with no consistent industry standard identified. Seventy-one percent of respondents indicated they have not participated in any training for nonprofit historic

preservation communication, likely due to limited availability. One interviewee explained that the reason for uncertainty around training is the niche topic and limited audience that would be interested. They advised it would be helpful to include a communication course within a historic preservation degree program. Since many organizations cannot support a dedicated staff member for communication, having related course work could alleviate some gaps in knowledge as it is an important skillset.

The National Preservation Partner Network connects statewide and regional nonprofits with over 120 members across the country. The Network includes affinity groups focused on certain topics that are relevant for the participants, including communication. The Network provides a way for organizations to learn from one another as the group is about education and sharing resources. Organization D, a small budget, Southeast nonprofit without a communication budget, highlighted their creation of a group with other local museums in the county to share ideas. The 40 different groups meet quarterly to coordinate calendars to avoid overlapping programming and support each other. As an example, they made a brochure to drive visitation that includes all the participating organizations and is carried at their respective museums.

CHAPTER FIVE: CONCLUSION

Communication is vital for strategic success of both for-profit and nonprofit organizations. This thesis investigated the ways in which historic preservation nonprofit organizations are planning, executing, and measuring their communication initiatives by surveying and interviewing over 30 organizations along the East Coast. The analysis identified variables to compare the organizations' communication strategies and methods. The evaluation of survey data determined the aspects which impact the organizational communication initiatives.

Budget size and employing a formal communications role were determined to be significant in impacting the methods and measurement of communication within the responding organizations. Number of board members, size of communication audience, type of community reached, and membership size did not show consistent importance to communication. At the outset of this thesis, it was expected that these data points would result in a range of responses with which to compare the communication strategies. Upon analysis of survey data, it was determined there was insufficient disparity in the results. This suggests board size, communication audience, and number of members do not impact the outcomes of communication planning and evaluation.

Regional geographic location, namely Southeast and Northeast regions, showed some instances of nuanced results, however there were limited conclusions to be developed from the analysis. Regionality showed a clear correlation with respondents with an education in communication; 40% of respondents in the Southeast had an education in communications compared to only 11% in the Northeast.

When evaluating communication strategies, Southeast-based organizations ranked all methods of communication higher than Northeast, however the mean ranked scores were similar, indicating that there are insignificant regional nuances to communication strategies. Conversely, Southeast ranked popular social media platforms (Facebook, Instagram, and X) higher in importance compared to the Northeast. Conversely, the Northeast ranked social media metrics as the most popular method of communication assessment compared to the Southeast; the remaining assessment methods ranked similarly in result. The Southeast ranked all methods of generating operational funding higher than the Northeast, with additional emphasis on retail sales and event/tour tickets.

Areas in which regionality did not differentiate in the survey data include communication audience size, target audience group allocations, delivering specific messages to specific audiences, and if the organization quantifies the results of their communication strategy.

Evaluating organizations by annual operating budget produced mixed results. Budget level does not have a bearing on education in communications, preservation focus areas of importance and likelihood to communicate, and communication methods. Data analysis revealed the Larger budget (above \$1 million) positively impacts the communication strategies. Larger budget organizations have a bigger audience, showing a correlation between budget and audience size. Larger budget organizations are more likely to deliver specific messages to specific audiences (58%) compared to Smaller budget (less than \$1 million) organizations (36%). Methods for generating funds produced similar rankings of importance for both Larger and Smaller organizations.

Larger budget organizations plan more consistently ahead of time as 58% plan either annually or quarterly. Conversely, Smaller budgets plan on an as needed basis (73%), indicating less strategic planning. When asked about quantifying communication strategies, 64% of Larger budget organizations confirmed they do quantify their results compared to 39% of Smaller budget.

There is a correlation between budget size and having a formal communications role. Larger budget organizations have a higher percentage of formal communications roles (75% compared to 29% for Smaller budget). This implies that Larger budget organizations can afford to have a specific staff member to focus on communication. Since data supports having a formal communications role does impact communication strategies, in a sense budget plays a role as well.

Having a communications role showed the most meaningful results; therefore, budget size does play a role as a driver for strategic communication. Nonprofits historically have limited resources for communication efforts and therefore have to find creative ways to generate funds. Knowledge sharing of communication methodologies amongst nonprofits of all types can result in the dissemination of creative ways to approach planning when funding is limited.

The main factor impacting communication at historic preservation nonprofit organizations along the East Coast is the presence of a formal communications staff member. Having an individual knowledgeable about communication methods, social media platforms, and planning, results in an increase in importance and likelihood to communicate. A formal communications role results in more sophisticated

communication tactics, such as using specific messaging for specific audiences. Those with a communications role were more likely to deliver specific messages to specific audiences (53%) compared to Smaller budget organizations (33%).

Organizations with a formal communications role ranked all but three methods of communication of higher importance compared to those without; the three with a lower ranking included person-to-person, podcasts, and print. Podcasts ranked low so there is a negligible difference. Since person-to-person communication is a free and easy to implement method, it makes sense that a formal role would rely on this. Generally, social media platforms ranked higher for all organizations with a formal communications role, except Snapchat and LinkedIn.

From an audience perspective, organizations with a formal communications role place more emphasis on non-member professionals and the non-member public, likely to drive additional membership, while those without a communications staff person focus on reaching members with communication outreach. Those with a communications role are more likely to quantify their results (57%) compared to those without (40%).

Organizations with a communications role rely on media metrics like social media and email engagements within their communication strategy assessment compared to organizations without a communications role. Nonprofits without a communications staff person use event registration and donations to measure their communications tactics.

Organizations with a formal communications role tend to plan ahead, 20% planning annually, 27% quarterly and 27% on an as-needed basis. There is a clear correlation

between having a communications role and the organization having a more strategic approach to planning and measuring communication.

The research and data analysis conducted in this thesis provides baseline information on historic preservation nonprofit communication trends. The data collection, data analysis, and conclusions could provide nonprofits resources for their own use as well as create a platform for future research. The research implications to historic preservation and planning fields show that if historic preservation nonprofits are aiming to increase and improve their communication, hiring a knowledgeable and focused communications professional will drive increased communication effectiveness.

Areas of Future Research

The research conducted for this thesis is meant to serve as a base for the evaluation of nonprofit communication. If this research were to be expanded, there are a few minor ways in which to improve the study. The survey was only delivered to the East Coast of the United States given the time constraints of the research period. To understand the full scope of communication in nonprofits, including organizations across the country would provide a more comprehensive view. The expanded data would provide additional points of comparison between geographic regions of the United States. Another factor inhibited by time constraints was the response rate. Allowing more time for respondents to complete the survey with additional email reminders may have resulted in additional survey completions or would help understand where the drop off rate occurred.

Additional questions surrounding communication at historic preservation nonprofits arose while evaluating the findings of this research. The first area of future study would be to conduct follow up research to expand upon various questions within the survey. A deeper study of audience development, targeting, and analysis would provide additional insight into how and why historic preservation nonprofits are approaching existing and new constituents with their communication. Based on the responses to the survey, this could be focused on larger budgeted organizations that are more likely to have an audience targeting strategy. Additional questions surrounding why and how audiences are used would provide context as well as interviews with questions focused on targeting capabilities and strategies. The data collected within the existing research does not provide the ability to analyze why each desired audience or constituent is being used. This research could help explain if certain constituent groups are targeted for fundraising versus other groups messaged with event announcements. This could be a helpful resource for both larger organizations as well as smaller ones that are unable to test audience targeting strategies but would like to incorporate the approaches into their communication.

Another area of future research would be to zero in on small-budget organizations to provide useful resources. Based on the responses in the survey, a best practice manual should be developed. The manual could include advice for how organizations with a lower budget could best utilize their resources based on learnings from other similar groups. This would include a study of how methods of communication are implemented, a recommendation of frequency of social media posts, and the best ways to meaningfully

measure communication. This would be useful to organizations that are unable to afford a formal communications role but want to implement strategic approaches to their communication.

Since this thesis focused on developing trends among organizations, these additional areas of research were discovered when the data was received and analyzed. Focusing on a specific aspect of communication, such as budget allocations or audience targeting, could provide additional analysis into the communication strategies through a lower volume of survey questions.

APPENDICES

Appendix A: Survey Questions

Question Number	Question	Form	Logic
1	What is your name and job title?	Fill in the blank	
2	How many years have you worked at your organization?	Multiple choice	
3	How many years have you worked in your current position?	Multiple choice	
4	Have you previously held a different position within the organization?	Yes/No	
5	What was the previous position you have and how long did you hold that position?	Fill in the blank	Displayed if “Yes” is selected to question 4
6	Did your education experience focus on communications?	Yes / No / I don't know	
7	What was your major and what degree did you complete?	Fill in the blank	
8	Have you participated in any training specific to nonprofit preservation communication?	Yes / No / I don't know	
9	If yes to above, what areas of education, how many training courses have you been to, and who hosted the training. Please elaborate.	Fill in the blank	Displayed if “Yes” is selected to question 8
10	Do you think there is a need for more formal literature or training for communication specifically at historic preservation nonprofit organizations?	Yes / No / I don't know	
11	What form of training would be best?	Multiple choice	Displayed if “Yes” is selected to question 10
12	What state are you located in?	Multiple choice	
13	Is your organization a private organization or a government agency (municipal, state, federal)?	Multiple choice	
14	Are you a 501c3 or another type of nonprofit organization?	Yes / No / I don't know	
15	How many people work at your organization?	Multiple choice	

16	What year was your organization established?	Fill in the blank	
17	Does your organization have a board of directors/trustees?	Yes/No	
18	How many board members/trustees does your organization have?	Fill in the blank	Displayed if "Yes" is selected to question 18
19	Does the board (or a subcommittee) advise on communications?	Yes / No / I don't know	
20	Does your organization have a mission statement?	Yes / No / I don't know	
21	If yes, please include your mission statement here.	Fill in the blank	Displayed if "Yes" is selected to question 20
22	What areas of historic preservation are part of your organization's normal work? Mark all that apply.	Mark all that apply	
23	Of the options you selected above, please rate the importance of each for your organization	Likert scale	Displayed if "Yes" is selected to question 22
24	Which range best describes your most recent annual operating budget?	Multiple choice	
25	Do you have an annual budget carved out for communications/advertising (does not include salary costs)?	Yes / No / I don't know	
26	If yes, please select the average annual communication budget from the amount below:	Multiple choice	Displayed if "Yes" is selected to question 25
27	Is your organization membership based?	Yes / No / I don't know	
28	What is your average membership (estimate to the nearest 50)	Fill in the blank	Displayed if "Yes" is selected to question 27
29	How much is the average annual membership cost per person?	Multiple choice	Displayed if "Yes" is selected to question 27

30	Rate the importance of each of the following methods of generating operational funds for your organization?	Likert scale	
31	Does your organization have a formal communications role?	Yes / No / I don't know	
32	Rate how likely you are to communicate the following areas of historic preservation important to your organization	Likert scale	Displayed if "Yes" is selected to question 27
33	How important are the below forms of communication to your organization?	Likert scale	
34	How important are the below forms of social media for your organization?	Likert scale	
35	As a way to measure the size of your organization, what type of community are you typically reaching with your organization?	Multiple choice	
36	Estimate the size of your audience for communication purposes. This could be membership, targeted public outreach, members of the public. This should include total audience reached. (Numeric values only)	Fill in the blank	
37	Breaking down this target audience into constituent groups, how much of this total number is registered members vs. non-member professionals vs. non-member public (in percentages)?	Constant Sum (Percentage)	
38	Are you using specific messaging to specific audiences in your communications?	Yes/No	
39	If yes, how do you segment your audiences?	Mark all that apply	Displayed if "Yes" is selected to question 38
40	Please list the top three audiences your organization is trying to reach with your communication. This question is left opened ended to help understand how you are naming and defining your target audience segments.	Fill in the blank	

41	Where do you get ideas for creative ways to reach your audience?	Fill in the blank	
42	Is there an audience that you wish you could reach that you are not currently?	Yes/No	
43	Can you name or elaborate on the audience you wish you could reach?	Fill in the blank	Displayed if “Yes” is selected to question 42
44	How do you plan your communication strategies?	Multiple choice	
45	What is the basis of the assessment period for communication efforts?	Fill in the blank	
46	Do you quantify the results of your communications strategy?	Yes / No / I don't know	
47	If yes, how? Select all that apply.	Mark all that apply	Displayed if “Yes” is selected to question 47
48	Do you conduct messaging testing with your communications evaluate effectiveness?	Yes/No	
49	Is there an industry standard organization or reference you use for ideas?	Yes/No	
50	If yes, please identify.	Yes/No	Displayed if “Yes” is selected to question 49
51	What’s the biggest challenge to implementing an effective communication strategy or campaign?	Fill in the blank	
52	Is there any other information that you would like to share?	Fill in the blank	
53	Do you have an example a successful communication campaign or a learning experience within your organization and would you be willing to participate in an additional interview with the researcher?	Yes/No	

54	One of the goals of this thesis is to include examples of case studies of communication at nonprofit organizations. Would you be willing to share an anecdotal communication strategy program or be willing to participate in an interview? If yes, please provide the best email address to reach out to.	Fill in the blank	Displayed if "Yes" is selected to question 53
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Appendix B: Interview Questions

1. What was the purpose of this communications/marketing campaign?
2. Who were you trying to reach (what was the audience)?
3. What communication methods were used?
4. Was success measured? If yes, how?
5. Were the measurement methods specific to this initiative or are they used across all efforts?
6. Why do you think this initiative was successful and/or a learning experience?
7. Is there any other information you would like to share about communications within historic preservation nonprofit organizations?

Appendix C: IRB Application Materials

Survey Consent Form

Information about the Research Study
Clemson University

Communication in Historic Preservation Nonprofits Survey

KEY INFORMATION ABOUT THE RESEARCH STUDY

Caroline Byrne is inviting you to volunteer for a research study. Caroline Byrne is a graduate student at Clemson University conducting the study with the supervision of Dr. Jon B Marcoux, Director of Graduate Program in Historic Preservation.

Study Purpose: The purpose of this research is to understand the trends that are currently present in Historic Preservation Nonprofit communication. A survey of historic preservation nonprofit organizations on the east coast will help determine what communication methods they are currently deploying and how they evaluate success. The goal of my survey is to understand trends within the data collected to provide preservation nonprofits with a better understanding of communications within the field.

Voluntary Consent: Participation is voluntary, and you have the option to not participate.

Activities and Procedures: Your part in the study will be to complete the survey. It contains 40-54 questions depending on your answers.

Participation Time: It will take you about 15 minutes to be in this study.

Risks and Discomforts: There are certain risks or discomforts that you might expect if you take part in this research. They include the release of full names, job titles, and contact information of participants. None of these details will be included within the final report without explicit written consent from the individuals therein, and all non-publicly available information will be deleted from all digital records at the conclusion of the project.

Possible Benefits: You may not benefit directly from taking part in this study; however, your responses will benefit the field of preservation by providing a resource to understand communication methods in nonprofit organizations. This information may help in the decision-making process regarding communication.

EXCLUSION/INCLUSION REQUIREMENTS

Participants in the survey must be directly associated with a preservation nonprofit in the East Coast (Connecticut, Washington DC, Delaware, Florida, Georgia, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, North Carolina, Pennsylvania, Rhode Island, South Carolina, Virginia, Vermont, and West Virginia) and have knowledge the of communication efforts.

PROTECTION OF PRIVACY AND CONFIDENTIALITY

The results of this study may be published in scientific journals, professional publications, or educational presentations.

All information that is not publicly accessible will be shared only between Caroline Byrne and Jon Marcoux. Identifiable information (such as full name or place of work) will not be included in the final study without explicit written consent. All information will be kept in a private Google Drive folder until it is destroyed.

Identifiable information collected during the study will be removed and the de-identified information will not be used or distributed for future research studies.

CONTACT INFORMATION

If you have any questions or concerns about your rights in this research study, please contact the Clemson University Office of Research Compliance (ORC) at 864-656-0636 or irb@clemson.edu. The Clemson IRB will not be able to answer some study-specific questions. However, you may contact the Clemson IRB if the research staff cannot be reached or if you wish to speak with someone other than the research staff.

If you have any study related questions or if any problems arise, please contact Caroline Byrne at byrne6@g.clemson.edu or Jon Marcoux at jbmarco@clemson.edu.

CONSENT

By participating in the study, you indicate that you have read the information written above, been allowed to ask any questions, and you are voluntarily choosing to take part in this research. You do not give up any legal rights by taking part in this research study.

Survey Email

To whom it may concern,

My name is Caroline Byrne and I am a graduate student pursuing an M.S. in Historic Preservation at Clemson University. As part of my thesis, I am conducting a survey of historic preservation nonprofit organizations on the east coast to determine what communication methods they currently deploy and how they evaluate these efforts. The goal of my survey is to understand trends within the data collected to provide preservation nonprofits with a better understanding of communications within the field.

I will be conducting a two tiered approach to my research. The first tier consists of a survey to gather information on current communication management practices of historic preservation nonprofits. The optional second step of my research is to gather case studies from willing participants showcasing best in class campaigns of communication by organizations. An interview will be conducted to better understand the goals, outcomes, and successes of the case study. Those who complete the survey do not have to participate in the interview but will be asked their willingness as a question in the survey.

I have selected you as a potential participant because of your association with historic preservation nonprofits. You are not obligated to participate if you do not wish to do so; there will be no penalty for abstention or compensation for involvement.

The survey consists of 40 to 54 questions, depending on the respondent's answers, and should take about 15 minutes to complete. All personal information will be stored securely and not made available to the public without express permission. Any identifying information will be deleted from digital storage once the project has been completed.

The second, optional phase interview will consist of approximately 7 questions and take about 30 minutes to complete. The interview will be scheduled after completing data collection of the survey, should you agree to participate.

The results of my thesis are intended to help historic preservation nonprofits understand the landscape of communication techniques, modes of measurement, and opportunities for future consideration. Completion of this survey will contribute to this goal of creating a valuable resource for historic preservation nonprofit organizations.

Please complete the survey portion of the research by 5:00pm EST on Friday, January 12th, 2023. If you have any questions or experience any difficulties accessing the survey, please contact me at byrne6@g.clemson.edu. Thank you for your participation!

Sincerely,
Caroline Byrne

Interview Consent Form

Information about the Research Study
Clemson University

Communication in Historic Preservation Nonprofits Interview

KEY INFORMATION ABOUT THE RESEARCH STUDY

Caroline Byrne is inviting you to volunteer for a research study. Caroline Byrne is a graduate student at Clemson University conducting the study with the supervision of Dr. Jon B Marcoux, Director of Graduate Program in Historic Preservation.

Study Purpose: The purpose of this research is to understand the trends that are currently present in Historic Preservation Nonprofit communication. A survey of historic preservation nonprofit organizations on the east coast will help determine what communication methods they are currently deploying and how they evaluate success. The goal of my survey is to understand trends within the data collected to provide preservation nonprofits with a better understanding of communications within the field. The interview portion of my research will help develop case studies of current strategies currently deployed.

Voluntary Consent: Participation is voluntary, and you have the option to not participate.

Activities and Procedures: Your part in the study will be to participate in an interview. It contains 7 questions depending on your answers.

Participation Time: It will take you about 30 minutes to be in this study.

Risks and Discomforts: There are certain risks or discomforts that you might expect if you take part in this research. They include the release of full names, job titles, and contact information of participants. None of these details will be included within the final report without explicit written consent from the individuals therein, and all non-publicly available information will be deleted from all digital records at the conclusion of the project.

Possible Benefits: You may not benefit directly from taking part in this study; however, your responses will benefit the field of preservation by providing a resource to understand communication methods in nonprofit organizations. This information may help in the decision-making process regarding communication.

EXCLUSION/INCLUSION REQUIREMENTS

Participants in the survey must be directly associated with a preservation nonprofit in the East Coast (Connecticut, Washington DC, Delaware, Florida, Georgia, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, North Carolina, Pennsylvania, Rhode Island, South Carolina, Virginia, Vermont, and West Virginia) and have knowledge the of communication efforts.

AUDIO/VIDEO RECORDING AND PHOTOGRAPHS

For the interview portion of the research, there will be audio recorded during the interview session. The recordings will not be shared publicly but the information gathered will be included in the analysis of the report. All non-publicly available information will be deleted from all digital records at the conclusion of the project. Transcripts of the recording will be completed to compile and organize the data; however, the transcripts will not be included in the final analysis nor will any identifiable data.

PROTECTION OF PRIVACY AND CONFIDENTIALITY

The results of this study may be published in scientific journals, professional publications, or educational presentations.

All information that is not publicly accessible will be shared only between Caroline Byrne and Jon Marcoux. Identifiable information (such as full name or place of work) will not be included in the final study without explicit written consent. All information will be kept in a private Google Drive folder until it is destroyed.

Identifiable information collected during the study will be removed and the de-identified information will not be used or distributed for future research studies.

CONTACT INFORMATION

If you have any questions or concerns about your rights in this research study, please contact the Clemson University Office of Research Compliance (ORC) at 864-656-0636 or irb@clemson.edu. The Clemson IRB will not be able to answer some study-specific questions. However, you may contact the Clemson IRB if the research staff cannot be reached or if you wish to speak with someone other than the research staff.

If you have any study related questions or if any problems arise, please contact Caroline Byrne at byrne6@g.clemson.edu or Jon Marcoux at jbmarco@clemson.edu.

CONSENT

By participating in the study, you indicate that you have read the information written above, been allowed to ask any questions, and you are voluntarily choosing to take part in this research. You do not give up any legal rights by taking part in this research study.

Appendix D: Survey Responses

How many years have you worked at your organization?	How many years have you worked in your current position?	Have you previously held a different position within the organization?	Did your education experience focus on communications?	Have you participated in any training specific to nonprofit preservation communication?	Do you think there is a need for more formal literature or training for communication specifically at historic preservation nonprofit organizations?	What form of training would be best?	What state are you located in?
Over 10 years, up to 20 years	Over 10 years, up to 20 years	No	No	No	I don't know		New York
Over 1 year, up to 5 years	Over 1 year, up to 5 years	No	No	No	No		New York
Over 20 years	Over 20 years	No	No	No	Yes	Online Classes	Maryland
Over 5 years, up to 10 years	Over 5 years, up to 10 years	Yes	No	Yes	Yes	All of the above	Rhode Island
Over 1 year, up to 5 years	Less than 1 year	Yes	Yes	No	Yes	All of the above	North Carolina
Over 1 year, up to 5 years	Over 1 year, up to 5 years	Yes	No	No	Yes	Best Practices Resource Manual	New York
Over 5 years, up to 10 years	Over 5 years, up to 10 years	No	No	Yes	I don't know		Pennsylvania
Over 1 year, up to 5 years	Over 1 year, up to 5 years	No	No	No	Yes	Best Practices Resource Manual	Florida
Over 1 year, up to 5 years	Over 1 year, up to 5 years	No	No	Yes	Yes	Hands-on Workshops	Rhode Island
Less than 1 year	Less than 1 year	No	No	Yes	Yes	Hands-on Workshops	New York
Over 5 years, up to 10 years	Over 5 years, up to 10 years	Yes	No	Yes	Yes	Best Practices Resource Manual	Florida
Less than 1 year	Less than 1 year	No	No	No	Yes	Best Practices Resource Manual	Virginia
Over 20 years	Over 1 year, up to 5 years	Yes	Yes	No	No		South Carolina
Over 1 year, up to 5 years	Over 1 year, up to 5 years	No	No	Yes	Yes	Best Practices Resource Manual	Maine
Over 1 year, up to 5 years	Over 1 year, up to 5 years	Yes	Yes	Yes	Yes	Online Classes	Georgia
Over 10 years, up to 20 years	Over 10 years, up to 20 years	No	No	No	Yes	Online Classes	Florida
Over 5 years, up to 10 years	Over 5 years, up to 10 years	No	No	No	I don't know		Georgia
Over 1 year, up to 5 years	Over 1 year, up to 5 years	Yes	Yes	No	No		South Carolina
Over 5 years, up to 10 years	Less than 1 year	Yes	No	No	Yes	Online Classes	New Jersey
Over 20 years	Over 1 year, up to 5 years	Yes	No	Yes	I don't know		Vermont
Over 5 years, up to 10 years	Over 1 year, up to 5 years	Yes	No	No	No		North Carolina
Over 10 years, up to 20 years	Over 10 years, up to 20 years	Yes	Yes	Yes	Yes	All of the above	North Carolina
Over 1 year, up to 5 years	Over 1 year, up to 5 years	No	No	No	Yes	Best Practices Resource Manual	District of Columbia
Over 1 year, up to 5 years	Over 1 year, up to 5 years	No	No	No	No		Pennsylvania
Over 1 year, up to 5 years	Over 1 year, up to 5 years	No	Yes	No	Yes	Online Classes	Florida
Over 10 years, up to 20 years	Over 10 years, up to 20 years	No	No	No	Yes	Best Practices Resource Manual	Massachusetts
Over 10 years, up to 20 years	Over 10 years, up to 20 years	Yes	No	No	I don't know		New Jersey
Over 1 year, up to 5 years	Over 1 year, up to 5 years	No	No	No	Yes	Hands-on Workshops	Virginia
Over 20 years	Over 20 years	No	No	Yes	Yes	Best Practices Resource Manual	Georgia
Over 1 year, up to 5 years	Less than 1 year	Yes	No	No	I don't know		New York
Over 5 years, up to 10 years	Over 5 years, up to 10 years	Yes	No	No	I don't know		Pennsylvania
Over 1 year, up to 5 years	Over 1 year, up to 5 years	Yes	Yes	No	Yes	Hands-on Workshops	Pennsylvania
Over 1 year, up to 5 years	Over 1 year, up to 5 years	No	No	No	Yes	Best Practices Resource Manual	South Carolina
Less than 1 year	Less than 1 year	No	Yes	No	Yes	Online Classes	New York

Is your organization a private organization or a government agency (municipal, state, federal)?	Are you a 501c3 or another type of nonprofit organization?	How many people work at your organization?	What year was your organization established?	Does your organization have a board of directors/trustees?	How many board members/trustees does your organization have?	Does the board (or a subcommittee) advise on communications?	Does your organization have a mission statement?
Private Organization	Yes	Less than 10	1977	Yes	20	Yes	Yes
Private Organization	Yes	Less than 10	1974	Yes	20	No	Yes
Private Organization	Yes	Less than 10	1960	Yes	26	No	Yes
Private Organization	Yes	Less than 10	1936	Yes	14	No	Yes
Private Organization	Yes	Less than 10	1966	Yes	20	Yes	Yes
Private Organization	Yes	Less than 10	2021	Yes	7	Yes	Yes
Private Organization	Yes	Less than 10	1979	Yes	21	No	Yes
Private Organization	Yes	Less than 10	1985	Yes	10	No	Yes
Private Organization	Yes	Less than 10	1956	Yes	20	No	Yes
Private Organization	Yes	Less than 10	1993	Yes	10	Yes	Yes
Private Organization	Yes	Less than 10	1978	Yes	8	Yes	Yes
Private Organization	Yes	Less than 10	1955	Yes	11	Yes	Yes
Private Organization	Yes	20 - 29	1961	Yes	15	Yes	Yes
Private Organization	Yes	Less than 10	1953	Yes	7	No	Yes
Private Organization	Yes	Less than 10	1964	Yes	24	No	Yes
Private Organization	Yes	Less than 10	1972	Yes	13	No	Yes
Private Organization	Yes	10 - 19	1973	Yes	35	No	Yes
Private Organization	Yes	40+	1961	Yes	15	No	Yes
Private Organization	Yes	Less than 10	1969	Yes	8	Yes	Yes
Private Organization	Yes	Less than 10	1980	Yes	20	No	No
Private Organization	Yes	10 - 19	1939	Yes	22	No	Yes
Private Organization	Yes	Less than 10	1985	Yes	17	Yes	Yes
Private Organization	Yes	Less than 10	1978	Yes	9	No	Yes
Private Organization	Yes	10 - 19	1939	Yes	25	Yes	Yes
Private Organization	Yes	10 - 19	1970	Yes	10	No	Yes
Private Organization	Yes	Less than 10	1960	Yes	15	No	Yes
Private Organization	Yes	10 - 19	1964	Yes	15	No	Yes
Private Organization	Yes	Less than 10	1940	Yes	12	Yes	Yes
Private Organization	Yes	Less than 10	1965	Yes	75	Yes	Yes
Private Organization	Yes	10 - 19	1973	Yes		No	Yes
Private Organization	Yes	10 - 19	1977	Yes	11	I don't know	Yes
Private Organization	Yes	Less than 10	1992	No			Yes
Private Organization	Yes	10 - 19	1920	Yes	20	No	Yes
Private Organization	Yes	Less than 10	1985	Yes	3	Yes	Yes

What areas of historic preservation are part of your organization's normal work? Mark all that apply.
Architectural Conservation/Rehabilitation,Preservation Policy,Archival Research,Public Education,Advocacy,Donations
Preservation Policy,Public Education,Advocacy,Workshops
Architectural Conservation/Rehabilitation,Preservation Policy,Public Education,Advocacy,Workshops,Historical Interpretation
Preservation Policy,Archival Research,Public Education,Advocacy,Workshops,Donations,Historical Interpretation,Cultural Resource Management
Architectural Conservation/Rehabilitation,Preservation Policy,Archival Research,Public Education,Advocacy,Historical Interpretation,Cultural Resource Management
Preservation Policy,Archival Research,Donations,Historical Interpretation
Preservation Policy,Public Education,Advocacy,Workshops
Architectural Conservation/Rehabilitation,Preservation Policy,Archival Research,Public Education,Advocacy,Donations
Architectural Conservation/Rehabilitation,Public Education,Advocacy,Workshops
Architectural Conservation/Rehabilitation,Archival Research,Public Education,Workshops,Donations,Historical Interpretation,Cultural Resource Management
Architectural Conservation/Rehabilitation,Archival Research,Public Education,Advocacy,Donations,Historical Interpretation
Architectural Conservation/Rehabilitation,Preservation Policy,Archival Research,Public Education,Advocacy,Donations,Historical Interpretation
Architectural Conservation/Rehabilitation,Preservation Policy,Archival Research,Public Education,Advocacy,Historical Interpretation,Cultural Resource Management
Architectural Conservation/Rehabilitation,Preservation Policy,Archival Research,Public Education,Historical Interpretation
Architectural Conservation/Rehabilitation,Preservation Policy,Archival Research,Public Education,Advocacy,Workshops,Donations,Historical Interpretation,Cultural Resource Management
Architectural Conservation/Rehabilitation,Archival Research,Public Education,Donations
Architectural Conservation/Rehabilitation,Preservation Policy,Advocacy,Workshops,Donations
Public Education,Advocacy,Historical Interpretation
Archival Research,Public Education,Workshops,Donations,Historical Interpretation
Architectural Conservation/Rehabilitation,Preservation Policy,Public Education,Advocacy,Workshops,Donations
Architectural Conservation/Rehabilitation,Public Education,Advocacy,Donations
Public Education,Donations
Architectural Conservation/Rehabilitation,Advocacy,Donations
Architectural Conservation/Rehabilitation,Archival Research,Public Education,Donations,Historical Interpretation,Cultural Resource Management
Architectural Conservation/Rehabilitation,Archival Research,Public Education,Donations,Historical Interpretation
Architectural Conservation/Rehabilitation,Donations,Historical Interpretation
Preservation Policy,Archival Research,Public Education,Advocacy,Donations,Historical Interpretation
Preservation Policy,Archival Research,Public Education,Advocacy,Workshops,Donations,Historical Interpretation,Cultural Resource Management
Architectural Conservation/Rehabilitation,Preservation Policy,Archival Research,Public Education,Advocacy,Workshops,Donations,Historical Interpretation,Cultural Resource Management
Architectural Conservation/Rehabilitation,Preservation Policy,Public Education,Advocacy,Workshops,Donations
Architectural Conservation/Rehabilitation,Preservation Policy,Public Education,Workshops,Donations,Historical Interpretation
Architectural Conservation/Rehabilitation,Preservation Policy,Archival Research,Public Education,Advocacy
Preservation Policy,Archival Research,Public Education,Advocacy,Donations,Historical Interpretation
Architectural Conservation/Rehabilitation,Preservation Policy,Archival Research,Public Education,Advocacy,Workshops,Donations,Historical Interpretation,Cultural Resource Management

Of the options you selected above, please rate the importance of each for your organization. - Cultural Resource Management	Which range best describes your most recent annual operating budget?	Do you have an annual budget carved out for communications/advertising (does not include salary costs)?	If yes, please select the average annual communication budget from the amount below:	Is your organization membership based?	What is your average membership (estimate to the nearest 50)	How much is the average annual membership cost per person?
	\$250K - \$499K	No		Yes	450	\$1 - \$49
	\$1 million - \$2M	No		Yes	250	\$50 - \$99
	\$0 - \$249K	Yes	\$0 - \$99K	No		
Very important	\$0 - \$249K	No		Yes	250	\$1 - \$49
Very important	\$250K - \$499K	Yes	\$0 - \$99K	Yes	250	\$100+
	\$0 - \$249K	No		Yes	150	\$1 - \$49
	\$1 million - \$2M	No		Yes	900	\$50 - \$99
	\$0 - \$249K	Yes	\$0 - \$99K	Yes	125	\$50 - \$99
	\$500K - \$1 million	No		Yes	500	\$1 - \$49
Slightly important	\$2M+	Yes	\$100K - \$249K	No		
	\$0 - \$249K	No		Yes	300	\$1 - \$49
	\$0 - \$249K	No		Yes	400	\$1 - \$49
Very important	\$1 million - \$2M	Yes	\$0 - \$99K	Yes	900	\$1 - \$49
	\$0 - \$249K	Yes	\$0 - \$99K	Yes	150	\$1 - \$49
Moderately important	\$500K - \$1 million	Yes	\$0 - \$99K	Yes	725	\$50 - \$99
	\$0 - \$249K	Yes	\$0 - \$99K	No		
	\$1 million - \$2M	Yes	\$0 - \$99K	Yes	3500	\$50 - \$99
	\$2M+	Yes	\$100K - \$249K	Yes	900	\$50 - \$99
	\$0 - \$249K	No		Yes	600	\$1 - \$49
	\$1 million - \$2M	Yes	\$0 - \$99K	No		
	\$1 million - \$2M	Yes	\$0 - \$99K	Yes	3500	\$1 - \$49
	\$0 - \$249K	Yes	\$0 - \$99K	Yes	200	\$50 - \$99
	\$250K - \$499K	Yes	\$0 - \$99K	No		
Very important	\$1 million - \$2M	Yes	\$0 - \$99K	Yes	500	\$100+
	\$500K - \$1 million	Yes	\$0 - \$99K	Yes	350	\$1 - \$49
	\$1 million - \$2M	Yes	\$0 - \$99K	No		
	\$0 - \$249K	No		Yes	200	\$1 - \$49
Moderately important	\$250K - \$499K	Yes	\$0 - \$99K	Yes	400	\$50 - \$99
Moderately important	\$250K - \$499K	Yes	\$0 - \$99K	Yes	450	\$50 - \$99
	\$2M+	I don't know		Yes	Unknown	\$50 - \$99
	\$0 - \$249K	No		Yes	250	\$1 - \$49
	\$0 - \$249K	No		No		
	\$2M+	Yes	\$0 - \$99K	Yes	4000	\$50 - \$99
Moderately important	\$0 - \$249K	No		Yes	100	\$1 - \$49

Rate the importance of each of the following methods of generating operational funds for your organization? - Memberships	Rate the importance of each of the following methods of generating operational funds for your organization? - Donations	Rate the importance of each of the following methods of generating operational funds for your organization? - Retail Sales	Rate the importance of each of the following methods of generating operational funds for your organization? - Historic Site Entry/Tour Tickets	Rate the importance of each of the following methods of generating operational funds for your organization? - Walking Tour Tickets	Rate the importance of each of the following methods of generating operational funds for your organization? - Other - Text	Rate the importance of each of the following methods of generating operational funds for your organization? - Other
Very important	Very important	Not at all important	Not at all important	Slightly important	Grants, Special Events	Very important
Very important	Very important	Not at all important	Not at all important	Not at all important		
Very important	Very important	Not at all important	Not at all important	Very important		
Very important	Very important	Not at all important	Slightly important	Moderately important	Endowment funds	Very important
Very important	Very important	Moderately important	Moderately important	Not at all important		
Slightly important	Very important	Slightly important	Slightly important	Not at all important	Events	Very important
Very important	Very important	Not at all important	Not at all important	Moderately important	Lectures	Moderately important
Moderately important	Very important	Not at all important	Slightly important	Moderately important	Program Events – [event] sponsorships and tickets	Very important
Moderately important	Very important	Not at all important	Not at all important	Not at all important	Events and programs	Very important
Not at all important	Slightly important	Not at all important	Slightly important	Slightly important	Income from the endowment	Very important
Very important	Very important	Slightly important	Very important	Slightly important		
Very important	Very important	Moderately important	Not at all important	Moderately important		
Very important	Very important	Moderately important	Very important	Very important	City & County appropriations, grants, & fee-for-service contracts	Very important
Very important	Very important	Moderately important	Very important	Very important	Special events income	Very important
Very important	Very important	Very important	Slightly important	Slightly important	Sales from our two Flea Markets each year	Very important
Slightly important	Very important	Slightly important	Not at all important	Not at all important	Grants	Very important
Very important	Very important	Slightly important	Moderately important	Not at all important	Fundraisers & Grants	Very important
Moderately important	Very important	Moderately important	Moderately important	Moderately important	Venue Rentals for Special Events	Very important
Very important	Very important	Slightly important	Not at all important	Very important	LECTURES, FUND RAISERS	Very important
Not at all important	Very important	Not at all important	Not at all important	Not at all important		
Very important	Very important	Slightly important	Very important	Slightly important	Selling historic properties	Very important
Very important	Very important	Slightly important	Not at all important	Not at all important	Fundraising: Festivals, Bingo, etc	Very important
Not at all important	Very important	Not at all important	Not at all important	Not at all important		
Very important	Very important	Moderately important	Moderately important	Moderately important		
Very important	Very important	Moderately important	Very important	Moderately important		
Not at all important	Very important	Not at all important	Not at all important	Not at all important	Retail lease revenue; developer fees	Very important
Moderately important	Moderately important	Not at all important	Very important	Not at all important		
Moderately important	Very important	Slightly important	Moderately important	Moderately important	Grants	Moderately important
Very important	Very important	Slightly important	Moderately important	Slightly important		
Very important	Very important	Not at all important	Not at all important	Not at all important		
Very important	Moderately important	Not at all important	Moderately important	Not at all important		
Slightly important	Moderately important	Very important	Not at all important	Slightly important		
Slightly important	Very important	Slightly important	Not at all important	Moderately important	Grants	Moderately important
Very important	Very important	Not at all important	Not at all important	Not at all important	Grant funding	Very important

Does your organization have a formal communications role?*	Rate how likely you are to communicate the following areas of historic preservation important to your organization - Architectural Conservation/Rehabilitation	Rate how likely you are to communicate the following areas of historic preservation important to your organization - Preservation Policy	Rate how likely you are to communicate the following areas of historic preservation important to your organization - Archival Research	Rate how likely you are to communicate the following areas of historic preservation important to your organization - Public Education	Rate how likely you are to communicate the following areas of historic preservation important to your organization - Advocacy	Rate how likely you are to communicate the following areas of historic preservation important to your organization - Workshops
No	Extremely likely	Extremely likely	Somewhat likely	Extremely likely	Extremely likely	
Yes		Extremely likely		Extremely likely	Extremely likely	Extremely likely
Yes	Extremely likely	Somewhat likely		Extremely likely	Somewhat likely	Somewhat likely
No		Extremely likely	Somewhat likely	Extremely likely	Extremely likely	Somewhat likely
Yes	Somewhat likely	Extremely likely	Somewhat likely	Extremely likely	Extremely likely	
No		Somewhat unlikely	Somewhat likely			
Yes		Extremely likely		Extremely likely	Extremely likely	Extremely likely
No	Somewhat likely	Extremely likely	Somewhat likely	Somewhat likely	Extremely likely	
No	Somewhat likely			Extremely likely	Extremely likely	Somewhat likely
Yes	Extremely likely		Somewhat likely	Extremely likely		Extremely likely
No	Extremely likely		Extremely likely	Extremely likely	Extremely likely	
No	Extremely likely	Extremely likely	Somewhat unlikely	Extremely likely	Extremely likely	
Yes	Extremely likely	Extremely likely	Somewhat likely	Extremely likely	Extremely likely	
No	Extremely likely	Extremely likely	Somewhat likely	Extremely likely		
Yes	Extremely likely	Somewhat unlikely	Somewhat unlikely	Somewhat likely	Extremely likely	Extremely likely
No	Somewhat likely		Somewhat unlikely	Somewhat likely		
Yes	Extremely likely	Extremely likely			Extremely likely	Extremely likely
Yes				Extremely likely	Extremely likely	
No			Extremely likely	Somewhat likely		Somewhat likely
No	Somewhat likely	Somewhat likely		Extremely likely	Somewhat likely	Extremely likely
Yes	Extremely likely			Extremely likely	Extremely likely	
Yes				Extremely likely		
Yes	Extremely likely				Extremely likely	
No	Extremely likely		Extremely unlikely	Somewhat likely		
Yes	Somewhat likely		Somewhat likely	Extremely likely		
Yes	Extremely likely					
I don't know		Somewhat unlikely	Extremely likely	Somewhat likely	Somewhat unlikely	
No		Somewhat unlikely	Extremely likely	Extremely likely	Somewhat likely	Somewhat likely
No	Extremely likely	Somewhat unlikely	Somewhat likely	Somewhat likely	Somewhat likely	Somewhat likely
No	Somewhat likely	Extremely likely		Somewhat likely	Extremely likely	Somewhat likely
No	Somewhat likely	Somewhat likely		Extremely likely		Extremely likely
No	Somewhat likely	Somewhat likely	Somewhat likely	Somewhat likely	Somewhat likely	
Yes		Extremely likely	Somewhat unlikely	Somewhat likely	Extremely likely	
No	Extremely likely	Somewhat likely	Extremely likely	Extremely likely	Somewhat likely	Extremely likely

Rate how likely you are to communicate the following areas of historic preservation important to your organization - Donations	Rate how likely you are to communicate the following areas of historic preservation important to your organization - Historical Interpretation	Rate how likely you are to communicate the following areas of historic preservation important to your organization - Cultural Resource Management	How important are the below forms of communication to your organization? - Person to person	How important are the below forms of communication to your organization? - Radio	How important are the below forms of communication to your organization? - Podcasts	How important are the below forms of communication to your organization? - Television	How important are the below forms of communication to your organization? - Email
Somewhat likely			Very important	Not at all important	Not at all important	Not at all important	Very important
			Very important	Not at all important	Not at all important	Not at all important	Very important
	Somewhat likely		Very important	Not at all important	Not at all important	Not at all important	Very important
Extremely likely	Somewhat likely	Extremely likely	Very important	Not at all important	Slightly important	Not at all important	Very important
	Extremely likely	Extremely likely	Very important	Not at all important	Not at all important	Slightly important	Very important
Somewhat likely	Extremely likely		Moderately important	Not at all important	Not at all important	Not at all important	Very important
			Moderately important	Slightly important	Not at all important	Not at all important	Very important
Extremely likely			Very important	Moderately important	Slightly important	Very important	Very important
			Moderately important	Not at all important	Not at all important	Not at all important	Very important
Extremely unlikely	Somewhat likely	Somewhat likely	Very important	Not at all important	Slightly important	Not at all important	Very important
Somewhat likely	Extremely likely		Very important	Slightly important	Very important	Moderately important	Very important
Extremely likely	Somewhat unlikely		Very important	Not at all important	Not at all important	Not at all important	Very important
	Extremely likely	Extremely likely	Very important	Slightly important	Slightly important	Slightly important	Very important
	Somewhat likely		Very important	Not at all important	Slightly important	Not at all important	Very important
Extremely likely	Somewhat likely	Somewhat likely	Moderately important	Slightly important	Not at all important	Moderately important	Very important
Somewhat likely			Very important	Not at all important	Slightly important	Not at all important	Very important
Extremely likely			Moderately important	Slightly important	Not at all important	Slightly important	Very important
	Extremely likely		Very important	Slightly important	Slightly important	Very important	Very important
Extremely likely	Extremely likely		Very important	Not at all important	Not at all important	Not at all important	Very important
Extremely likely			Very important	Not at all important	Not at all important	Not at all important	Very important
Extremely likely			Very important	Not at all important	Not at all important	Slightly important	Very important
Extremely likely			Very important	Slightly important	Not at all important	Slightly important	Very important
Somewhat likely			Moderately important	Slightly important	Slightly important	Slightly important	Very important
Extremely likely	Somewhat likely	Somewhat likely	Very important	Slightly important	Not at all important	Not at all important	Very important
Somewhat likely	Extremely likely		Very important	Slightly important	Not at all important	Slightly important	Very important
Extremely likely	Extremely likely		Very important	Slightly important	Not at all important	Slightly important	Very important
Somewhat unlikely	Extremely likely		Very important	Not at all important	Not at all important	Not at all important	Very important
Extremely likely	Extremely likely	Somewhat unlikely	Very important	Moderately important	Slightly important	Slightly important	Very important
Somewhat likely	Somewhat likely	Somewhat unlikely	Very important	Slightly important	Slightly important	Moderately important	Very important
Somewhat unlikely			Very important	Not at all important	Not at all important	Not at all important	Very important
Extremely likely	Somewhat likely		Very important	Not at all important	Not at all important	Not at all important	Slightly important
			Very important	Not at all important	Slightly important	Slightly important	Moderately important
Extremely likely	Somewhat likely		Very important	Slightly important	Not at all important	Slightly important	Very important
Extremely likely	Somewhat likely	Somewhat likely	Very important	Not at all important	Not at all important	Not at all important	Very important

How important are the below forms of communication to your organization?* - Paid Search / Search Engine Optimization	How important are the below forms of communication to your organization?* - Social Media	How important are the below forms of communication to your organization?* - Print (i.e. Newspapers, Magazines)	How important are the below forms of communication to your organization?* - Newsletters	How important are the below forms of communication to your organization?* - Press/Media	How important are the below forms of communication to your organization? - Other	How important are the below forms of communication to your organization? - Other - Text
Not at all important	Very important	Very important	Not at all important	Moderately important		
Not at all important	Very important	Not at all important	Moderately important	Moderately important		
Slightly important	Very important	Not at all important	Not at all important	Not at all important		
Not at all important	Very important	Slightly important	Very important	Very important		
Slightly important	Moderately important	Slightly important	Very important	Very important		
Slightly important	Very important	Slightly important	Moderately important	Slightly important		
Not at all important	Moderately important	Moderately important	Very important	Moderately important		
Moderately important	Very important	Very important	Very important	Very important		
Not at all important	Very important	Slightly important	Moderately important	Moderately important		
Not at all important	Very important	Slightly important	Very important	Slightly important		
Slightly important	Very important	Moderately important	Very important	Moderately important		
Slightly important	Very important	Moderately important	Very important	Slightly important		
Very important	Very important	Moderately important	Very important	Very important		
Very important	Very important	Very important	Very important	Very important		
Moderately important	Very important	Slightly important	Very important	Very important		
Slightly important	Very important	Very important	Slightly important	Slightly important		
Not at all important	Very important	Moderately important	Very important	Very important		
Very important	Very important	Moderately important	Very important	Very important	Very important	Website
Not at all important	Very important	Moderately important	Moderately important	Moderately important		
Not at all important	Not at all important	Not at all important	Very important	Slightly important	Very important	Annual Report
Moderately important	Very important	Very important	Very important	Very important		
Moderately important	Very important	Moderately important	Very important	Very important		
Slightly important	Moderately important	Moderately important	Moderately important	Moderately important		
Very important	Very important	Moderately important	Not at all important	Moderately important		
Slightly important	Very important	Moderately important	Very important	Very important		
Not at all important	Very important	Moderately important	Very important	Very important		
Not at all important	Moderately important	Moderately important	Very important	Moderately important		
Slightly important	Very important	Moderately important	Very important	Moderately important		
Not at all important	Very important	Very important	Very important	Very important		
Slightly important	Very important	Moderately important	Very important	Moderately important		
Not at all important	Moderately important	Very important	Moderately important	Moderately important		
Not at all important	Moderately important	Slightly important	Moderately important	Slightly important		
Slightly important	Very important	Very important	Very important	Very important		
Very important	Moderately important	Very important	Very important	Moderately important		

As a way to measure the size of your organization, what type of community are you typically reaching with your organization? - Selected Choice	Estimate the size of your audience for communication purposes. This could be membership, targeted public outreach, members of the public. This should include total audience reached. (Numeric values only)	Breaking down this target audience into constituent groups, how much of this total number is registered members vs. non-member professionals vs. non-member public (in percentages)? - Registered Members	Breaking down this target audience into constituent groups, how much of this total number is registered members vs. non-member professionals vs. non-member public (in percentages)? - Non-Member Professionals	Breaking down this target audience into constituent groups, how much of this total number is registered members vs. non-member professionals vs. non-member public (in percentages)? - Non-Member Public	Breaking down this target audience into constituent groups, how much of this total number is registered members vs. non-member professionals vs. non-member public (in percentages)? - Other
City	10,000	50	5	40	5
State	10,000	15	60	25	0
Neighborhood	15,000	29	0	71	0
Town	15,000	15	5	80	0
City	5,000	0	0	0	100
State	5,000	5	0	95	0
City	5,000	50	31	19	0
County	1,400	0	0	100	0
City	25,000	18	19	49	14
Eastern Seaboard	10,000	0	40	60	0
City	40,000	63	29	8	0
City	4,000	25	10	65	0
City	350,000	2	1	97	0
Town	1,000	20	10	70	0
City	10,000	5	5	90	0
Town	200	50	0	50	0
State	30,000	12	5	83	0
City	418,307	1	4	95	0
State	6,000	40	10	50	0
State	800	34	20	46	0
State	10,000	40	25	35	0
Tri-County Area	25,000	1	10	89	0
City	10,000	20	50	30	0
Tri-State Region	65,000	10	2	88	0
City	5,000	47	7	46	0
City	7,000	0	12	83	5
City	800	40	0	60	0
City	5,000	30	20	50	0
City	10,000	10	20	50	20
City	24,000	35	25	24	16
Town	250	90	0	10	0
City	5,000	5	15	55	25
City	500,000	1	5	89	5
State	150,000	10	0	90	0

Are you using specific messaging to specific audiences in your communications?	If yes, how do you segment your audiences? - Selected Choice	Please list the top three audiences your organization is trying to reach with your communication. This question is left opened ended to help understand how you are naming and defining your target audience segments.
Yes	How people engaged with the organization.	Organizational members, General Public, Community Leaders
Yes	Geography,Membership	preservation colleagues, grassroots preservationists, preservation/history enthusiasts
No		Young people, [city] lovers, residents of greater [city] metro area
No		1) All local people, 2) members and other self-identified interested parties (eg, those signed up for our newsletter or social media but are not members), 3) those traveling to our community for tourism--in that order
No		Our "target audience" is anyone who loves historic structures and local history. If I had to choose audiences, it would be homeowners, history lovers, businesses,
Yes	Geography,Membership	Foodies, preservationists, locals
No		Membership, professionals, general public
No		Members, Preservation Supporters, Public Officials
Yes	Income,Geography,Membership	1. Members and preservation loyalists; 2. Municipal/state stakeholders and decision makers; 3. Residents who live in and/or own a property 50 years or older
Yes	By interest in certain subject matter or by who has come to events about certain subjects before. Or for example, communications to students and schools vs to professionals. Mostly this pertains to outreach about special events for focused groups.	Students, HP Professionals, HP Enthusiasts / General Public
Yes	Age,Income,Geography,Membership	older children and organizations that can help us grow
No		Those interested in history, those interested in preservation, those who live in our city.
Yes	Geography,Membership,Other	Heritage tourists, residents of [city] and [county], members.
No		Constituents in the database, Businesses and foundations, General Public
Yes	Membership	Members (We have 11 membership levels), General public who might become members or are simply interested in our work, Members of the general public who are interested in our semiannual [event]
No		We don't have any employees and no formal program. We try to reach out to the community to get people to attend events typically. There is an email list and items are posted, mostly on Facebook. Some SEO. Some via the city website if we are doing a joint event.
Yes	Membership,Previous engagement through event/program ticket sales	Members and past members, Non-members that have participated in event/program or purchased tickets, Non-members engaging with our content (show interest in preservation) primarily on social media
Yes	Membership	[organization] Members, [organization] non-members, and tourists to [city]
No		Visitors to our historic town, community members, people interested in our towns history
No		Community members, Donors, Interested Individuals
No		State residents, preservation-minded people, preservation professionals
No		History enthusiasts, The next generation through scholarships and children/teen activities, Young professionals to carry on our legacy
Yes	Geography,Membership	Easement Property Owners, Donors, community members
Yes	Membership	Donors, MembersGeneral Public/Tourists
No		Members, Museum Visitors, Community Members
No		Funders, Government officials, Neighborhood residents, Opinion leaders
Yes	Membership	House tour attendees, local history fans, [event] attendees
Yes	Geography,Membership	Membership and local community who will likely become members, Local community interested in local history, Affiliated community associated with similar local history organizations
No		Members; potential members; general public;
No		
No		We try to reach potential members mostly through social media and we try to communicate with our members through the local newspaper and a yearly newsletter
No		
Yes	Geography,Membership	Members, nonmembers
No		General Public, Professionals, Retired Individuals

Where do you get ideas for creative ways to reach your audience?	Is there an audience that you wish you could reach that you are not currently?	Can you name or elaborate on the audience you wish you could reach?	How do you plan your communication strategies?
Staff / Board / other organizations	Yes	Business Community	On an as-needed basis
following other orgs on social, comms newsletters	Yes	younger historic homeowners and emerging professionals	Quarterly
our own	Yes	Young People	Weekly
Depends on what we're marketing. Eg, walking tours are targeted to tourists while homeowner workshops are targeted to locals.	No		On an as-needed basis
Other organizations	Yes	The best audience for us was the current generation passing away. We are struggling with replacing them. They were much more active physically and financially than the current "younger" generations.	On an as-needed basis
Other non-profits	Yes	Foodies	On an as-needed basis
Staff meetings	No		Quarterly
volunteers	Yes	wealthy donors	On an as-needed basis
NA	Yes	We've done some analysis that indicates that if people know about us, they feel strongly (they love us or they have deep skepticism). But our market penetration could be much, much stronger. We're currently serving and speaking to a few of the city's 25+ neighborhoods.	Quarterly
Mostly through brainstorming with the staff and board. We are using some strategic consultants who also advise on outreach. And we occasionally survey our constituents on how they want to be contacted / reached by us.	Yes	I would not say that we are not reaching certain audiences, we desire, it is more a scale question - how can we reach a broader number of similar audiences.	Annually
committee	Yes	young people and large donors	On an as-needed basis
Our social media committee	Yes	A broader audience of those not already knowledgeable about our work	On an as-needed basis
Internally and through our marketing committee	No		Quarterly
A number of other organizations efforts which inspire me to create my own materials & content	Yes	Finding younger people interested in the town's history	Annually
Our own initiatives locally, whether rehab work or calls to action; playing off the local news; best practices from other preservation groups	No		On an as-needed basis
I would not say we are creative at reaching people.	Yes	reach "snowbirds" that come in season and let them know of all the events taking place.	On an as-needed basis
Looking at similar organizations, or other non-related content we like	Yes	younger demographics	On an as-needed basis
Colleagues at [organization], colleagues in the marketing field, online	No		Annually
Board members, committee members	No		On an as-needed basis
I see what others are doing, or wait for ideas to occur to me at random times.	Yes	More affluent young people who could replace the old rich donors	Annually
Collaborating with different teams	No		On an as-needed basis
Brainstorming sessions, Surveys, partnering with Tourism and Chambers of Commerce, perusing other museum websites & social media	Yes	Young professionals	Quarterly
Peer organizations, social media	Yes	Prospective donors	Monthly
General press, industry peers	Yes	International travelers	Annually
Other museum complex systems	No		On an as-needed basis
Informal networks, reading, socials, and internal brainstorming	Yes	Emerging ethnic groups of other languages	Monthly
from appropriate trustees and members	Yes	Latino residents	On an as-needed basis
internet, word of mouth	Yes	High net worth donors	On an as-needed basis
affinity groups	Yes	Minority community	On an as-needed basis
	No		Quarterly
	No		On an as-needed basis
	No		On an as-needed basis
Other organizations, social media	No		Annually
I am going to focus on creating a Facebook page for this organization (social media)	Yes	Social media users	Annually

Do you quantify the results of your communications strategy?*	If yes, how? Select all that apply. - Selected Choice	Do you conduct messaging testing with your communications evaluate effectiveness?*	Is there an industry standard organization or reference you use for ideas?	If yes, please identify.
Yes	Event registration,Donation amounts,Social Media Metrics,Email opens/engagements	No	No	
Yes	Event registration,Social Media Metrics,Email opens/engagements	No	No	
Yes	Event registration,Donation amounts,Social Media Metrics,Email opens/engagements	No	No	
No		No	No	
No		No	Yes	Preservation Maryland
No		No	No	
No		No	No	
Yes	Event registration,Donation amounts,Social Media Metrics,Email opens/engagements	No	No	
No		No	Yes	AAM, NCPH, NEMA
Yes	Event registration,Social Media Metrics,Email opens/engagements	No	No	
Yes	Event registration,Donation amounts,Social Media Metrics,Email opens/engagements	No	No	
No		No	No	
Yes	Event registration,Donation amounts,Social Media Metrics,Email opens/engagements	No	No	
Yes	Event registration,Donation amounts,Social Media Metrics,Email opens/engagements	No	No	
Yes	Event registration,Donation amounts,Social Media Metrics,Email opens/engagements	Yes	No	
No		No	No	
I don't know		No	Yes	Indiana Landmarks, Atlanta History Center
Yes	Event registration,Donation amounts,Social Media Metrics,Email opens/engagements	Yes	No	
No		No	No	
No		No	No	
No		No	No	
No		No	No	
Yes	Donation amounts,Social Media Metrics,Email opens/engagements	No	No	
Yes	Event registration,Donation amounts,Social Media Metrics,Email opens/engagements	No	Yes	AAM, AMMC, AFP
No		No	No	
No		No	No	
I don't know		No	No	
No		No	No	
I don't know		No	No	
Yes	Event registration,Donation amounts,Social Media Metrics	No	No	
I don't know		No	No	
No		No	No	
Yes	Event registration,Donation amounts,Social Media Metrics,Email opens/engagements,Earned Media,Advocacy Influence	No	No	
I don't know		No	No	

What's the biggest challenge to implementing an effective communication strategy or campaign?
Time - full time staff of 2 does not allow the time needed to assess and segment as much as we would like.
money and staff capacity
cash
Actually getting people's attention, eg, on social media. We are a 3-person, part time staff, so there are very real limits on what we can accomplish regarding communication.
One full-time staff person
Volunteer availability
Time and money - we have a very small staff
lack. of expertise and volunteer time constraints
Time split across multiple areas of responsibility
Providing a balance of content that is fresh for each of our areas of focus: HP, Dec, Arts, and Historic Landscapes
we are all volunteers and none of us have a background in communications and PR so it is by the seat of our pants.
Budgets
unsure
We have a small budget and 1 1/2 staff so communications falls in the Directors hands and there is not enough time to devote to these efforts. In addition, many of our members do not have the social media platforms to reach them. They prefer printed materials.
Finding ways to tap into people's limited time and attention span. We know our work is important, but people are bombarded with information these days, so we have a lot to compete with.
Reach vs cost.
Prioritizing which communications are most important and probably sending too many communications, specifically emails, as a result
Limited budget for paid advertising; must rely on free tactics to reach audiences.
TIME, EXPERTISE
staff time
Getting people to read and stay interested when the topic needs a lot of words.
see questions 46, 48, 49
Not enough funding for communications/advertising
Staff resources
Channel Oversaturation
Time and money
volunteers
lack of staffing and funding
Don't know.
Time
We are all non professional and just trying to do the best we can.
We are all volunteers, so time is an issue.
Distilling complicated concepts, communicating shifts in the preservation field
Finding interested individuals to help in the organization.

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