

This document is annotated to show the remarkable progress that has been achieved in the steps outlined to create PBN. All annotations are in italics and dated; otherwise, this Case Statement is presented as it existed prior to the vote of the members of the Preservation Coalition and the Landmark Society to join forces.

September 21, 2008

Case Statement for Preservation Buffalo Niagara

Prepared by Henry McCartney for the Transition Committee and revised through discussions and workshops with the committee and the Trustees of the Landmark Society and PresCo.

Contents

The Limitations of Buffalo's Preservation Movement

The Catalysts for Preservation Buffalo Niagara

The Vision for a Full-Service Preservation Organization for Buffalo

Creating Preservation Buffalo Niagara

Step One—Establishing One Operating Entity

Step Two—Building an Effective Board

Step Three—The Staffing Plan

Step Four —Establishing the first initiative

Step Five—Year One and Later Activities

Step Six —Plan for a Neighborhood and Housing Initiative(s)

Step Seven —Funds A Transition Fund and Long-Term Sustainability

The Limitations of Buffalo's Preservation Movement

The heart of a community does not lie in its spanking new suburban office parks, but in the restaurants, offices, shops, bars, theatres, incubator businesses, and so many more uses, including homes, found in older structures. Historic preservation can be defined as the identification and care of these places coupled with the revitalization and stabilization of the neighborhoods and commercial areas that house a community's older structures.

Since World War II, historic preservation has been an ever evolving movement, with the entire country serving as a laboratory for developing local projects and skills to make preservation useful in many different situations, be it building pride in a community, reinforcing sweat-equity efforts of residents, fostering tourism, rebuilding neighborhoods, creating a revitalization effort in a commercial district, or working to maintain the rural character of a region's countryside. Preservation works best in cities where preservation is so engrained that multiple preservation endeavors are initiated and supported by a variety of public, civic and private organizations and individuals.

For older cities, historic preservation is a revitalization strategy for neighborhoods, commercial districts and economic reinvestment that has no equal.

A significant and unique strength of historic preservation is that it has been largely a grassroots movement. This strength has also been a liability for some cities, as preservation's impact in

different communities has been uneven. In Buffalo, many historic places survive today despite having once been threatened by demolition or degraded by neglect. A short list of these revitalized places includes the Coit House, Guaranty Building, St. Paul's Cathedral, Shea's, Buffalo's Olmsted Park System, Emerson Rowhouses, Kleinhans Music Hall, the Allentown Historic District, the Darwin Martin House, the Market Arcade, Graycliff, the Buffalo Schools rebuilding effort, the Cotter Fireboat (the first floating landmark in the country), Hull House, the Roycroft Inn, Niagara Reservation, Old Fort Niagara, Erie Canal (Buffalo & Tonawanda harbors and other towns along hundreds of miles of canal way) and many more.

These preservation activities, while very laudable, have almost exclusively been specific campaigns revolving around a unique situation. Momentum from one effort does not sustain itself; each issue becomes a separate initiative, and the building and developing needed for a strong organization fails to happen. Buffalo's preservation organizations have always been small, financially fragile, at times divided, and often rely totally on volunteers.

This lack of a substantial, professionally staffed preservation organization has limited Buffalo's movement in many ways. The number of persons involved in Buffalo's preservation is small and the very real importance of Buffalo's architecture is inadequately appreciated by its residents. Persons attracted to historic preservation, staff and volunteers, find their efforts hampered by very meager resources of all kinds. Relationships with preservation's state and national organizations and agencies are inadequately developed. An understanding of preservation techniques is not spread to allied agencies and neighborhood organizations. Vital community needs remain unaddressed. Significant areas of Buffalo, especially the city's eastside neighborhoods, have seen virtually no preservation activity. Too often, public policy lacks preservation's input; the "5 in 5" plan is a good example. Preservationists are seldom consulted early in project development, perhaps due to the confusion of having three preservation organizations. Too often, preservationists engage in an issue only at the last minute, earning the reputation of being obstructionists.

These limitations are especially glaring because Buffalo is among the relatively small number of cities, cities such as Savannah, San Francisco, Galveston, and Providence with the unique wealth of architectural assets in sufficient quality to attract tourists to a community. Consequently, historic preservation in Buffalo does not fulfill its potential to play a significant role in the economic life of its city.

The Catalysts for *Preservation Buffalo Niagara*

Multiple factors converged to create *Preservation Buffalo Niagara*. In 2005 the Convention and Visitor's Bureau started exploring the possibility of bringing the National Preservation Conference to Buffalo. This goal enabled preservation, civic, and foundation leaders to work together in a new way, culminating in a very successful dinner (June 2007) where 430 people welcomed National Trust president, Dick Moe, to Buffalo for the first time. The Trust responded to this new energy and coordination of resources not only with the selection of Buffalo for its 2011 conference, but also with greater National Trust involvement in a series of important preservation issues and support for developing a more dynamic preservation movement for the city.

In 2006 the Landmark Society and the Preservation Coalition started co-administering Buffalo Tours; doing so helped both groups share ideas for a stronger preservation movement. At the

National Trust's suggestion, these organizations and the Campaign for Greater Buffalo engaged a nationally known preservation consultant to assess opportunities and challenges in Buffalo. Responding to the report's recommendation for a more unified preservation movement and the need for a more substantial preservation organization, the Landmark Society and Preservation Coalition created a joint Exploratory Committee. Board members also researched and assessed 32 preservation organizations from around the country. The Baird Foundation's Catherine Schweitzer, recently appointed as one of two National Trust Advisors for New York State, was asked by the Trust and others to help; she agreed to lead a Transition Committee. This committee, together with Henry McCartney, the long-time former director of Rochester's Landmark Society (1984-2005), and in concert with both organizations, created the vision and plan for *Preservation Buffalo Niagara*.

The Vision for a Full-Service Preservation Organization for Buffalo

A substantial, multi-faceted preservation organization must be developed for preservation to reach its full potential. In Buffalo, revitalizing architectural assets should be driving our city's economic development.

The array of activities provided in other cities is a useful guide for the role a professional preservation organization would play in Buffalo. *Preservation Buffalo Niagara* will focus its energies on serving Erie and Niagara Counties while assisting as possible in other adjacent counties. This vision, to be developed over time, includes:

- **Building a Preservation Constituency** - developing a large constituency for preservation and using that constituency to foster pride and investment in the historic resources found in a community (countering the negative attitude often found among residents of older cities).
- **Developing Professional Expertise** - employing within its staff trained preservationists that have a comprehensive knowledge of their field, reinforced by volunteers who have expertise in preservation, architecture, construction and allied fields; developing productive relationships with staff of state and national preservation organizations and insights into their programs and procedures.
- **Providing Preservation Leadership and Advice** - providing preservation leadership and coordination, serving as a resource center for historic preservation throughout a region, reinforcing homeowners, neighborhood leaders, preservation commission members, historic site organizations, merchants, village leaders and others on the productive use of historic preservation techniques.
- **Creating Alliances and Partnerships** - productively working with a wide range of agencies and organizations whose activities impact upon historic resources, including public agencies, nonprofit and professional organizations and real estate developers.
- **Expanding and Sharing Knowledge of Historic Resources** - working to expand the region's inventory of historic resources, encouraging historic resource assessment as part of community planning and welcoming consultations with property developers and project planners in advance of project development.
- **Conducting Heritage Education Efforts** - through programs, events and tours, coupled with public relations, to educate the public and students about a city's and

- neighborhood architectural heritage and the benefits and opportunities of having an older city with significant historic resources.
- **Serving as an Advocate for Historic Resources** - able to utilize its constituency, expertise, contacts, leadership and resources to engage in a full spectrum of actions to work to save historic places ranging from advice, assistance, creation of legal protections, and, when necessary, political and legal actions.
 - **Fostering Job Opportunities related to Preservation** – provide training and support for persons in building construction (especially skilled craftsmen), architecture, home renovation, real estate development/sales and other related fields, emphasizing continuing education in emerging arenas (i.e. green standards for rehabs).
 - **Addressing Community Needs** identifying needs, advancing potential solutions, encouraging and developing preservation initiatives, and capitalizing on new trends and opportunities as they arise. Addressing Buffalo’s deteriorating housing stock and neighborhoods is the city’s primary need; see Step Five.

*July 2009 Comment: An addition should now be added to this list—**Enhancing Preservation’s Sustainable Living Ethic** The greenest building is an existing building. Tremendous energy is already embodied within our homes, buildings and public infrastructure. Our older neighborhoods are located near jobs and mass transit, offering a more sustainable lifestyle. Working to keep existing homes and neighborhoods vibrant and keeping our cities and existing communities livable places is an important way to work for better climate and energy independence.*

Creating Preservation Buffalo Niagara **Step One—Establishing One Operating Entity**

Preservation Buffalo Niagara will form by 'joining together' the Landmark Society and the Preservation Coalition. In layman's terms, it will be a 'merger' while in legal parlance this will be a consolidation of operations. This approach, developed pro bono by attorneys serving both organizations, was reviewed and unanimously approved by both boards at their September 8, 2008 meeting. Ratification of this strategic restructuring will be requested from the dues paying members of both organization, and the election of a new board of trustees, at an October joint membership meeting.

*The name of the Landmark Society of The Niagara Frontier will change to **Preservation Buffalo Niagara**, which will be the new organization’s operating entity. **Preservation Buffalo Niagara** will retain the 501 C 3 and New York State Board of Regents charter of the Landmark Society. The bylaws of both organizations will be changed, with **Preservation Buffalo Niagara** remaining a membership organization with a reconstituted board. The Preservation Coalition of Erie County’s name will change to **Preservation Development Buffalo Niagara**, retaining the possibility of using this organizational entity as a development vehicle in the future.*

Reaching consensus on this plan was possible because of a willingness to work together, the influence of the National Trust and the Preservation League, an ability to obtain outside assistance, a desire to work through tough issues at joint board meetings and facilitated workshops and a common goal that Buffalo have a more substantial preservation organization.

July 2009 Update—The members of both organizations met together on October 16, 2009 and unanimously approved these resolutions and approve PBNs. Because of legal concerns raised by having similarly sounding names, the renamed development entity is now called PresCo Development.

Step Two—Building an Effective Board

In recent years, both the Landmark Society and the Preservation Coalition have operated with little or no staff; in essence they have been led and operated by volunteers. As is natural, boards of all-volunteer organizations must be very hands-on and such boards cannot have defined relationships between board and staff responsibilities. However, there is an important legacy of accomplishment by these organizations in spite of their limited capacity, and the new organization will use this legacy to build the future identity of the new organization.

Preservation Buffalo Niagara will have a very different board culture and operating procedures, as this ‘new’ organization will be operating in very different circumstances and will be starting out in a new cycle of organizational development. New persons must quickly be engaged, to help create this new culture and to add additional skills, energy and resources.

The 21 person board has been designed to retain the expertise, energy and organizational memory from the existing trustees with a significant influx of at least 10 new trustees.

The Transition Committee is serving as the initial nominating committee. Their selection process, now underway, includes an assessment of the types of persons and skills needed on the new board, a review of the desires, skills and commitment of members of the existing boards, and consultation with allied organizations to identify potential candidates for the board. Potential board candidates will be vetted through several references and a face-to-face meeting to brief them regarding the expectations for board members. To serve, a candidate must understand that board membership requires their commitment of time, talent and treasure (financial support at a level that is personally meaningful).

The new bylaws establish a Governance Committee to foster trusteeship. The new board will be brought together through an orientation session and social occasions.

All board members will know that there must be a continuing focus on financial sustainability. The foundation support to enable a quick transition into a substantial organization will last three years; this approach is to give *Preservation Buffalo Niagara* sufficient resources and time to develop revenue streams to support its core staff and general operations. With staff, trustees will concentrate on improving membership revenues, individual giving, planned giving, and fundraising events (such as a major House and Garden Tour). As *Preservation Buffalo Niagara* is announced, an aggressive membership campaign will be launched (Attachment E).

Significant work of this new organization will be conducted at the committee level. While the new board will decide upon its own committee structure, these committees have been suggested for consideration: Executive; Finance & Audit, Membership & Development; Governance; Education, Tours & Marketing; Preservation Issues.

As with the Board itself, these committees will benefit from having both experienced and new persons. While the new organization's trustees need to be active in at least one committee, these committees will also benefit from having non-trustees, including former board members of the joining organizations as well as new participants. In particular, persons active with allied organizations will be recruited as committee members. The committees will serve as training grounds for board membership.

July 2009 Update Elected at the October 2008 members meeting was a new board consisting of ten persons that currently served on one (or both) of the predecessor boards, with eleven Trustees elected that had were not on either board.

Step Three—The Staffing Plan

The strategy for *Preservation Buffalo Niagara* is to insure that the 'new' preservation organization has staff, with professional training and experience, to allow it to operate as an effective preservation organization, to develop effective new initiatives, and to very quickly become a recognized resource for preservation in the Buffalo region.

The initial 'core' staff will consist of three professional staff and administrative support. This level of staff avoids dependence on a single individual and reduces the burn out factor that can plague the 1-person shop. Most importantly, while unique funding is critical to support this level of staffing, *Preservation Buffalo Niagara* will be able to continue this core staffing level through very specific fundraising, membership, other individual giving, NYSCA GOS support and event/tour/program revenues. The core professional staff: Executive Director, Preservation Specialist, Education Coordinator. While not part of this core staff, a Neighborhood/Housing Specialist will join the staff in Year-Two.

Preservation Buffalo Niagara will invest in its staff on an ongoing basis. Resources and staff time should be available to allow participation in local staff training programs (computers, nonprofit management, fundraising, etc.), the state-wide Preservation Colleagues program, and attendance at National Trust conferences and workshops.

A. Executive Director

The Executive Director will be the most critical hire. A successful candidate must have experience in preservation and must share the philosophy that preservation is of cultural, neighborhood and economic importance to a community. The Executive Director must also have demonstrated non-profit management skills, be able to provide staff leadership, be able to communicate effectively, have experience in public policy and advocacy, be able to cultivate community contacts, have an ability to supervise staff and have experience with fundraising.

The Executive Director will be the organization's CEO, reporting to the Board of Trustees. All staff, even those who work closely with board members, committees and volunteers, will be supervised and evaluated by the Executive Director. While the Board of Directors will approve/monitor budgets and establish policy and procedures, the Executive Director will make all personnel decisions, including evaluations, hiring and firing.

A newly hired executive director must immediately focus on many activities: be a liaison with local and state preservation organizations, get to know local organizations whose efforts impact historic preservation, develop contacts and brief Buffalo's governmental, civic and foundation leaders, quickly become involved in Buffalo preservation issues, reinforce the development and competence of the board of trustees.

The executive director will also work on making *Preservation Buffalo Niagara* financially successful, seeking to replace initial foundation support with membership support, individual giving, event & tour revenues, other earned revenues and administrative support built into future programs. Over many years, a complimentary cycle should be sought, with an increasing membership leading to enhanced tour & events leading to increased membership.

B. Preservation Specialist

The Preservation Specialist must have a depth of training and expertise in one and preferably two or more preservation arenas; i.e. a staff person from an effective preservation organization in another city, a person who has been a Main Street manager, perhaps a person with direct experience in the development and financing of building renovations or neighborhood revitalization efforts, someone that has worked in a SHPO office or for a preservation commission, someone with a high degree of construction competence, and/or someone highly skilled in National Register and survey work.

Having two preservation professionals within one organization is a major benefit of this plan. The executive director and preservation specialist working as a team will be able to address Buffalo's preservation needs significantly better than can be expected from any solo person. Also, this staffing plan will permit the executive director to give needed attention to the organization's education functions.

Educational Coordinator

The Educational Coordinator is another important position, and a Coordinator has recently been hired. Necessitated by the needs of Buffalo Tours but also as a first step in creating a full-service organization, both boards authorized the hiring of an Educational Coordinator at their combined May board meeting. Currently, the Educational Coordinator is becoming familiar with the operations of Buffalo Tours, improving and adding value to Tours as possible, with a special emphasis on increasing publicity and participation. The Educational Coordinator is also working to implement a new initiative to provide orientation tours to college students and has begun planning for future educational initiatives.

C. Office Staff

An organization's office staff is extremely important, serving as the 'front lines'. New staff and activities will require additional administrative support. The incumbent office manager does admirable work. Unless she wishes to become full-time, additional part-time staff will be hired to bring total administrative staffing to 120% FTE (i.e. two staff, each 3 days per week).

July 2009 Update—Henry McCartney served as PBNs interim director from January through June 2009. After an extensive national search, PBNs first executive director, Michael Miller started in July 2009; immediately upon his hiring the position of Preservation Specialist was advertised and should be filled by the end of the summer. The Educational Coordinator was hired in July 2008 and additional office staff in February 2009.

Step Four —Establishing the first initiative

As *Preservation Buffalo Niagara* was being developed, a special opportunity presented itself; a National Trust staff person suggested that *Preservation Buffalo Niagara* apply for a National Trust *Partners in the Field* grant. Through matching grants, the National Trust is helping to establish a small network of Field Service programs, both with statewide organizations and with a few metropolitan regions, including Boston, Philadelphia, and Denver. In addition to funding, the National Trust provides staff training, extensive materials and networking with similar specialists to provide the selected field service communities access to a large ‘toolbox’ on preservation practices and programs, as well as on-going mentoring from their skilled staff.

Staffing this program will be the envisioned Preservation Specialist. The program has the potential for providing significant benefit for the western New York region by advancing preservation activities through numerous neighborhood organizations and community groups, reinforcing the preservation programs of municipalities, and providing essential information to property owners, be they homeowners or commercial interests. All can benefit from preservation expertise and impartial advice.

Subsequent inquiries have shown a remarkable interest from two other potential collaborators. The historic preservation bureau of the New York State Office of Parks, Recreation and Historic Preservation feels Buffalo is an area with special needs deserving focused attention. This office oversees federal preservation efforts in New York, including the rehab tax credit program, the state’s own preservation efforts and project reviews. SHPO has no staff in Buffalo and will utilize the Preservation Specialist as an extension of their office. The Preservation Specialist will help facilitate National Register nominations, tax credit projects and other state programs.

The Preservation League of New York State is a state-wide non-profit, based in Albany with one preservation staff person assisting preservation organizations throughout central and western New York. The Preservation Specialist will reinforce the League’s efforts in greater Buffalo, which includes grant and training programs.

All three collaborators will back up the Preservation Specialist with staff resources and advice whenever the Preservation Specialist encounters unfamiliar situations and issues. Dubbed the Coordinated Historic Preservation Field Service Program, this collaboration will be unique within New York State.

The process for applying for the National Trust grant starts in September, with final applications due in January, 2009. If awarded, the National Trust will provide matching funds for three years. An application for a matching grant (for two years) has been submitted to the Community Foundation of Greater Buffalo.

The National Trust established this program to expand the effectiveness of existing preservation organizations. A requirement for their matching grant is that an organization must have a full-time, paid executive director, deemed essential for hiring, supervising and assisting the field service staff person.

Support by the Oishei Foundation for Preservation Buffalo Niagara's executive director will make this application for this National Trust Partners in the Field grant very strong, bringing \$105,000 new dollars into the community over 3 years.

July 2009 update: Considering that before 2008, no Buffalo preservation organization would even qualify for this program, the success effort to obtain this Partners in the Field grant was a remarkable achievement, made possible by these key factors:

- *The creation of Preservation Buffalo Niagara*
- *The John R. Oishei grant to support the executive director position.*
- *The awarding of year-one matching funds by the Community Foundation of Greater Buffalo*
- *A recognition by the National Trust of the importance of Buffalo and its region.*

The National Trust grant award was for \$117,000

Step Five—Year One and Later Activities

During its first year, *Preservation Buffalo Niagara* will concentrate on implementing the field service program described above. With or without the Partners in the Field Grant, the preservation specialist position will be filled and this staff person, along with the Executive Director and the Education Coordinator, will start working closely with National Trust, SHPO and Preservation League staff, and launch an effective, even if less comprehensive, field service and technical assistance program in the Buffalo region. Doing so will quickly allow *Preservation Buffalo Niagara* to be recognized as a key player in historic preservation.

After the new board for *Preservation Buffalo Niagara*, the executive director and other key staff are in place, a planning process will be launched to evaluate current activities and create strategies for future initiatives, with an emphasize on how to productively impact Buffalo's neighborhood and housing issues, and encourage economic development (See Step Six).

Some discrete activities will still be launched while the strategic planning process is underway, to show the new organization's value and increase its exposure. Ideas for likely 'quick successes' should be collected and the new board and staff will start implementing the easiest, most feasible as soon as possible. While only a few can be undertaken in Year-One, recommendations for possible actions include:

- Create a web site or page, Exploring Buffalo's Architecture and History, combining with Buffalo Tours the calendars and tour opportunities of all the city's historic places.
- Expand connections to Niagara County and local historic preservation commissions.
- Conduct a workshop on Maintenance and Energy Conservation for Religious Buildings.
- Host periodic meetings, both for discussion and social contacts of staff and key volunteers of all preservation and related organizations, including regional, town and village historic commissions especially as plans are made for the bi-national centennial anniversary of the Boundary Waters Treaty in 2009 and the bi-centennial remembrance of the War of 1812 in 2012.
- Create a Technical Advisory Committee of restoration architects, historic preservationists and construction persons and use this expertise to provide free advice for key projects.

- Conduct cultural resource surveys for key places (special note: a grant has recently been awarded by the Preservation League for such survey work).

As soon as operations begin, *Preservation Buffalo Niagara* will establish an evaluation process, which will be very helpful during the strategic planning process and for reporting to funders. All staff, especially the Preservation Specialist, will record contacts of assistance provided via phone, office visits, meetings, presentations, and especially site visits. The main measure will be an Action Items List of direct activities (i.e. a tour) and substantial assistance for preservation activity of others, such as: use of Collaborator programs (tax credits, grant applications, project reviews, National Register nominations); other project and grant requests; building evaluation reports; rehabilitation projects; cultural resource surveys; new historic preservation commissions; new historic districts; public policies advancing preservation; use of preservation in municipal planning; training programs for homeowners, architects, and others; specific preservation successes; and more. Initially, *Preservation Buffalo Niagara* can judge itself in comparison with National Trust field service programs being established in other cities. Eventually Buffalo's experience will be built into the evaluation process.

July 2009 Update— Many more of these ideas can now be implemented as PBNs staff comes into place; a search is underway for the Preservation Specialist to staff the Partners program. A very successful year-one initiative was PBNs Awards Luncheon. Awards categories and criteria were developed, a nomination form developed, the publicized, and a gratifying number of nominations submitted. The Luncheon itself was extremely well attended, with over 350 participants and a gratifying number of corporate sponsors. Our first regional effort was co-sponsoring the regional preservation conference on historic preservation in Medina in May 2009. The Preservation League of New York State provided support of PBNs first cultural survey effort, which is now underway in the North Prospect Hill neighborhood.

Step Six —Plan for a Neighborhood and Housing Initiative(s)

Buffalo's most pressing need is its deteriorating housing stock and declining neighborhoods. Once the new executive director is in place and acclimated, planning should begin for the next major initiative for *Preservation Buffalo Niagara*, which will be the creation of an initiative or initiatives to address housing and neighborhoods. The specifics of such a program will be developed through a very deliberate strategic planning process that will include a close review of effective programs throughout the country. Among programs to be considered would be the home loan program developed by Cleveland's preservation organization and Rochester's neighborhood and real estate marketing initiative. Creating a pilot effort focusing efforts on a key Buffalo neighborhood should also be considered. In addition, the impact of high gasoline prices on the nation's land use patterns should be closely monitored to see if a local effort could capitalize on new trends; i.e. promoting "Rehab is the Ultimate Green" as a marketing tool for reinvigorating reinvestment in older neighborhoods.

Another important part of this planning process will be consultations with local organizations, including neighborhood groups as well as LISC, PUSH and UB's Regional Institute to better

understand conditions, assess unmet needs, seek feedback and identify ways to collaborate or partner.

Preservation Buffalo Niagara's Year-2 and Year-3 budgets contain funds for a Neighborhood/Housing Specialist, with the intent of leveraging this staff resource with public funds, additional grant support and possibly even development revenue. The staff functions and future funding of this position should be a major consideration of the strategic plan.

With great hope, this document has strived to present a compelling case for *Preservation Buffalo Niagara*. Many people and organizations have come together to foster the creation of this organization. They have done so not because they are overly concerned with the past but because they are focused on the future. Buffalo and its region needs and deserves a substantial preservation organization because historic preservation programs, tools and techniques can effectively address a wide array of important issues. *Preservation Buffalo Niagara* will facilitate a greater understanding, appreciation, and utilization of Buffalo's wealth of architectural resources. Through new initiatives and by reinforcing the work of other organizations and individuals, *Preservation Buffalo Niagara* will help revitalize Buffalo's neighborhoods and foster the region's economic development. These tasks are vital for Buffalo and its region.

This request of the John R. Oishei Foundation is for the most critical need for this effort to succeed, to enable *Preservation Buffalo Niagara* to employ a professional executive director. In addition, Oishei Foundation support will help insure that this executive director and *Preservation Buffalo Niagara* are as effective as possible by funding a strategic planning process along with board development and training. Having a full-time executive director will also enable *Preservation Buffalo Niagara* to apply to the National Trust for Historic Preservation for a grant to establish a staffed historic preservation field service program for the Buffalo region, which will be an exciting new initiative. Oishei Foundation support will also be a vital endorsement that will help facilitate other funding to fully support *Preservation Buffalo Niagara* and enable this new organization to unleash the great potential embodied in Buffalo's architecture.

July 2009 Update—as soon as PBN's executive director and preservation specialist are accumulated, PBN plans to launch this significant strategic planning process, utilizing funds provided by the John R. Oishei Foundation.

Step Seven —Funds A Transition Fund and Long-Term Sustainability

The strategy of *Preservation Buffalo Niagara* to quickly become a substantial organization requires a multi-year infusion of needed resources from key foundations for salaries and other significant expenses for three years. Fortunately, Buffalo has a number of foundations that know the importance that historic preservation and neighborhood revitalization is for Buffalo's future. These foundations, , have also provided leadership funding for the 2011 National Trust conference, seeing it as a major benefit for Buffalo. Total support needed over a three year period is @ \$700,000.

The essence of this approach is to give *Preservation Buffalo Niagara* sufficient resources and time to develop a revenue stream to support its general operations. These revenues should be from sources that

the new organization can cultivate and count upon far into the future, while it is essential that the new organization's board and staff maintain a commitment to fundraising.

An historic preservation organization's greatest advantage is that its concerns with older buildings and sites, especially in a city such as Buffalo, allows it to operate virtually anywhere within its jurisdiction. Preservation events and programs can engage people in many different neighborhoods. By its very nature, preservation also provides numerous media opportunities via highly visible projects and activities in different parts of a community. *Preservation Buffalo Niagara* must capitalize on these advantages. The relatively small core of current members should be expanded, more people should be reached via events and tours, and tour and event participants must be asked to join. Once established, a larger membership should itself contribute to better event participation, while improving event attendance should lead to higher membership. Increasing the new organization's membership base will bring with it increased opportunities to obtain additional support. Foremost, more members will provide a larger base to solicit for an annual appeal. and eventually a major gifts campaign. A potential also exists, perhaps after the new organization's successful first year, to launch a Creators Fund (or perhaps called a Sustainability Fund or Independence Fund). Given the new organization is being enthusiastically received, the new organization might be able to launch a multi-year pledge drive for \$1000 per year for 3-year gifts (x 50 or so supporters). Eventually, increased membership will enable the new organization to institute significant campaigns for major gifts and for planned giving. *Preservation Buffalo Niagara* should apply for NYSCA general operating support, and seek on-going public, foundation, corporate and other sources of support to create financial sustainability by its fourth year.

July 2009 Update The Transition Fund was supported by the John R. Oishei Foundation, the DB Trust and the Baird Foundation; additional Transition Fund support is being sought. Efforts to seek more members have been very successful; the 415 combined members as of October 2008 has now grow to 750 members with a goal of 1000 or more individual and family members by the end of 2009. the combined membership. An increased participation of Buffalo Tours is also adding to PBNs pool of potential members. The long term goal of financial stability must remain a constant concern and focus of PBNs staff and Trustees.