

PROTECTION OR PERIL?
AN ASSESSMENT OF SELECTED GEORGIA NONPROFITS
AS CUSTODIANS OF HISTORIC PROPERTIES

by

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(Under the Direction of CARI GOETCHEUS)

ABSTRACT

Local and state nonprofits that advocate for historic preservation have long championed to save historic properties from destruction and demolition by maintaining numerous sites across the country. However, some historic preservation nonprofits' property portfolios have suffered losses, largely due to oversight by volunteers who do not understand the nuances of historic preservation and nonprofit management. This thesis poses two questions in relation to this phenomenon, namely "What nonprofit management organizational factors are critical in engaging local/state nonprofit membership organizations to successfully manage historic properties?" and "Are there other preservation-related factors?" Answers are grounded in several sources: background research on nonprofit best management practices and best preservation practices; selected Georgia nonprofits' history; and case studies of properties owned and maintained by those organizations. Ultimately, solutions are offered to guide state and local nonprofits in being better preservation stewards.

INDEX WORDS: NSDAR, GSSDAR, Georgia Trust, Society of the Cincinnati in the State of Georgia, Historic Augusta, Inc., Historic preservation, Nonprofit management, Meadow Garden, Howard Manor, Hay House, Boyhood Home of President Woodrow Wilson, Harper Fowlkes House, Andrew Low House

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DEDICATION

I dedicate this to my friends and family who have pushed me along the way.

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CHAPTER 1

INTRODUCTION

For well over a decade, I have noticed people musing whether there are too many house museums and preserved sites. As a member of the Georgia State Society National Society Daughters of the American Revolution (GSSDAR), I have heard of chapters within the organization whose houses have become overwhelming to maintain and preserve. One example is the Atlanta Chapter House, otherwise known as Craigie House. This house was a historic home across from Piedmont Park in Atlanta, Georgia. Built in 1911, it was reported to be the second-oldest DAR structure in the United States and was listed on the National Register of Historic Places. Yet this status did not afford the site protection; the Atlanta Chapter was eventually forced to sell the house because it was too costly to maintain. The property had encountered several maintenance and preservation issues over the years: a tree fell on the house in the 1980s; Hurricane Opal ravaged the area in 1995; and the house collapsed in 2014 due to an ice storm. With no funding, the house was demolished in 2016.¹

I have served on National, State, and Chapter Historic Preservation Committees, and no two administrations appear to approach historic preservation the same way. While the National Society Daughters of the American Revolution (NSDAR) has roughly

¹ Myfoatlanta Staff, "Ice to blame for D.A.R. building collapse in Midtown," Fox Television Stations, February 12, 2012, Accessed October 12, 2021, <https://web.archive.org/web/20140215131830/http://www.myfoatlanta.com/story/24709869/2-story-brick-building-collapses-in-ne-atlanta>

190,000 members, they fall into individual State Societies and Units Overseas Societies whose membership sizes vary.² Individual chapters within a State Society or a Units Overseas Society can also differ, even having as few as twelve members per chapter. GSSDAR currently hosts more than 8,000 members and over 100 chapters of fluctuating sizes. Even though NSDAR sets guidelines for State Societies and Units Overseas Societies to communicate with their respective chapters about historic preservation, goals can be altered to suit individual societies' requirements. Independent thought can be useful; however, an inconsistent approach to historic preservation at NSDAR's multiple levels can negatively affect historic properties, potentially causing physical damage to sites. This dilemma piqued my curiosity about other nonprofits in the state of Georgia that manage historic properties (?).

Statement of Problem

Historic preservation nonprofits have been and continue to be vital resources in saving historic properties from destruction and demolition. However, at the state and local levels, these organizations do not always act as good custodians after initial conservation efforts for several reasons. First, the bylaws of the nonprofits of hereditary societies may shift based on leaders' desires. As each administrative term varies, leadership changes are associated with the given administration, and an organization may be unaware of limitations set by previous administrations. Historic preservation can thus be at a disadvantage (e.g., for sites requiring extensive physical work) when an administration change is newly committed to patriotism or education, rather than historic

² "Become a Member," Daughters of the American Revolution, Last modified October 2, 2015, Accessed November 12, 2020, <https://www.dar.org/national-society/become-member/member-interests>.

preservation. The same issue applies to local chapters within an organization, if the Chapter Regent oversees chapter projects.³

Second, local nonprofits have different funding opportunities than state nonprofits. Although membership dues provide a source of funding at all levels, member numbers naturally influence the amount of funding from dues. Funding also comes from donors, events, and other revenue sources that can differ with an organization's location and site needs.

Third, nonprofits must be cognizant of the historic preservation infrastructure within which the historic properties they manage might reside. Some nonprofits are in historic districts, but this setting does not guarantee protection. Being within a major metropolitan area of the United States could pose challenges involving expanding construction or eminent domain. Nonprofits must also interface with the city surrounding their properties, including by working with local development authorities. This necessity raises the question of how well these nonprofits cooperate with their local Historic Preservation Commission or State Historic Preservation Office. Georgia features local city or county historic preservation commissions along with the Georgia's Historic Preservation Division, which is under the Department of Community Affairs and serves as the State Historic Preservation Office (SHPO). These resources for historic properties may go untapped if the nonprofit has not established connections with these agencies.

Fourth, even though some nonprofits have the resources and staff available to educate themselves about proper historic preservation standards and processes established by the Secretary of the Interior, most are first and foremost volunteer

³ Troxell, VanBuren, and Wright, DAR Handbook and National Bylaws, 103, 187-188

organizations; they simply rely on members' contributions. Not all volunteers have a background related to preservation, and some members are more knowledgeable than others. Yet leadership at any level must monitor ongoing historic preservation responsibilities to ensure properties are well managed regardless of the administration's focus. For instance, with historic sites come site records and the question of how carefully these records are maintained. Anecdotal evidence suggests that nonprofits in Georgia follow record-keeping procedures, but whether these historic property records are available to the public for research purposes is inconsistent.

These initial ambiguities, along with other inconsistencies identified during my yearslong membership in a nonprofit preservation organization, spurred two research questions guiding this thesis: "What nonprofit management organizational factors are critical in engaging local/state nonprofit membership organizations to successfully manage historic properties?" and "Are there other preservation-related factors?"

Methodology

Answers to these questions were gained in part through background research on several topics, including a history of best practices in nonprofit management and preservation. This step helped to determine what does and does not typify a successful nonprofit as well as effective preservation practices. Some nonprofits attending to historic preservation have a firm sense of what such preservation entails and strong relationships with their local Historic Preservation Commission and State Historic Preservation Office. Other hereditary societies, including those at the local level, may not fully utilize their corresponding Historic Preservation Commission or State Historic Preservation Office.

State-level nonprofits might also possess a clearer understanding of optimal historic preservation methods owing to available resources.

In addition to background research, I interviewed current staff in charge of managing properties of interest at the state and local levels in Georgia. Case studies, which were chosen based on predefined criteria, were performed at each level to observe nonprofits' historic preservation processes. These studies enabled me to evaluate organizational efforts around historic preservation and to analyze nonprofits' custodianship of their properties to answer my research questions. I specifically determined the following for each case: (a) whether bylaws posed a danger to the site; (b) how the organization managed the site; (c) how the property received funding; (d) the property's physical location; (e) in the event of changes, how much preservation had occurred, current and historical dealings with preservation partners, and historic preservation-related education and awareness by the organization in charge; and (f) if and how the site maintained historic records and whether they were accessible to the public.

As part of the case studies, I also obtained each nonprofit's most recently available Form 990 from GuideStar, an information service that specializes in reporting on U.S. nonprofits. Form 990 is a United States Internal Revenue Service (IRS) form which provides the public with financial information about a nonprofit organization. Tax-exempt organizations must file an annual information return or notice with the IRS unless an exception applies; this information is gathered through either Form 990, Form 990-EZ, Form 990-PF, or Form 990-N. These forms are the IRS's primary tools for gathering information about nonprofits. Nonprofit organizations also use Form 990 to share

information with the public about their programs. Additionally, state governments rely on this form to perform charitable and other regulatory oversight and to satisfy tax filing requirements for organizations claiming exemption from state income tax.

Organization of Chapters

Following this chapter's introduction to the topic, Chapter 2 presents an overview of best practices in organizational management while focusing on nonprofits and preservation. Nonprofits and nonprofits with historic properties are also distinguished. Chapter 3 contains a series of case studies, including a summary of the criteria and methodology applied at each site. This chapter also summarizes my background research on the chosen sites, including interviews with site managers, and refers to the previously identified source material. Organizations' existing conditions, such as the business structure, administrative challenges, and preservation challenges, are outlined as well. This chapter further provides an evaluation of nonprofit organizational successes and failures and proposes strategies to promote high-quality site management.

Chapter 4 reviews how the research questions have been answered based on the acquired data. Guidance is offered so that nonprofits may learn from this assessment and apply recommendations for future development. In Chapter 5, additional research directions are suggested for the preservation of the focal sites and other nonprofit-maintained historic properties.

CHAPTER II

BACKGROUND RESEARCH

This chapter contextualizes my research questions. Two broad areas are discussed: nonprofit management and the process of physically preserving and maintaining a historic property. Topics related to nonprofit management include the business management structure, organizational factors that nonprofits should possess, and capacity building as a measure of success. Regarding historic preservation, the general field is first introduced followed by an overview of the physical preservation process (e.g., based on national standards for levels of preservation and proper maintenance). Nonprofit preservation organizations' typical approaches to enhance recognition and conservation of cultural resources under their care are also described. This chapter closes with a list of key factors in nonprofit management and metrics of success for physical historic preservation.

Best Practices in Organizational Management

Many companies, organizations, and businesses interact with and manage historic properties. Some businesses address repairs and renovations of historic material while other organizations are created with a mission to preserve a property for future generations' focusing on education and interpretation. These groups primarily differ in their purpose, which influences the chosen form of business ownership (i.e., for-profit vs. nonprofit).

To understand what a local nonprofit should be doing to ensure effective management, it is first necessary to identify overarching best management practices for nonprofits. Hence, business structures and management tools are discussed here. Seven types of business ownership exist: 1) sole proprietorship, 2) partnership, 3) limited partnership, 4) corporation, 5) limited liability company, 6) cooperative, and 7) nonprofit organization.⁴ Many small companies are sole proprietorships or businesses owned by one person. A small company can also be a partnership, in which case at least two individuals claim ownership in the business. A limited partnership is an offshoot of a partnership: this business form includes a general partner and a limited partner, with the general partner holding personal liability for the business.⁵ Larger companies tend to be corporations or fully independent businesses with shareholders who receive stock in the business.⁶ A limited liability company is a hybrid of a sole proprietorship and a corporation: this business form includes not owners but members who are not personally liable for business decisions.⁷ A cooperative, or co-op, is fully owned and operated for the benefit of the organizational members who use its services. To become a co-op, an organization must create bylaws, create a membership application, assemble a board of directors, and hold a charter member meeting.⁸ A nonprofit organization exists for educational or charitable purposes;⁹ these organizations also “... play a unique role as an

⁴ Prabhu TL, *Startup Merchandising Business Ideas 125: Merchandising Business How to Setup*, (Mumbai, India: Nestfame Creations Pvt. Ltd., 2019), 5

⁵ TL, *Startup Merchandising Business Ideas*, 6

⁶ Ibid, 6

⁷ Ibid, 7

⁸ Ibid, 8

⁹ Ibid, 8

intermediary between the citizens and their government. They maintain and transmit values to a degree that government has been unable to do.”¹⁰

Nonprofit Management

The nonprofit sector is best described in terms of what nonprofits do not do; that is, they are structured for purposes other than profit generation. A nonprofit can be organized as a corporation, an individual enterprise, an unincorporated association, a partnership, a foundation, or a condominium created for the greater good of society. A defining characteristic of nonprofits is the use of funds: “Simply put, if there are funds leftover at the end of the year, nonprofit executives cannot pocket them.”¹¹

Taxes also play a major role in characterizing nonprofits. The IRS defines two main nonprofit types: nonprofit organizations and not-for-profit organizations. Nonprofit organizations serve the public through goods and services whereas not-for-profit organizations serve member groups. The IRS additionally lists several types of nonprofit organizations with federal tax-exempt status online and in the publication, “Tax Exempt Status for your Organization.” Most organizations serving as nonprofits for historic sites have 501(c)(3) designation: “Corporations, organized and operated exclusively for religious, charitable, scientific, testing for public safety, literary, or educational purposes, or to foster national or international amateur sports, or prevention of cruelty for children or animals.” The IRS considers nonprofit organizations focusing on historic preservation as charitable organizations.

¹⁰ Gary M. Grobman, *The Nonprofit Handbook: Everything You Need to Know to Start and Run Your Nonprofit Organization*, 6th Edition, (Harrisburg, PA: White Hat Communications, 2011), 13

¹¹ Walter W. Powell and Patricia Bromley, *The Nonprofit Sector*, 3-5

Nonprofit Management Structure and Hierarchy

Nonprofits are required to form a board of directors to provide leadership and to craft bylaws guiding the nonprofit's direction.¹² The board size is determined based on the organization's general purpose, mission, and needs. For example, if the board's role is strictly policymaking (with policies implemented by staff), then a smaller board might be appropriate.¹³ Board members' term lengths, titles, role descriptions, and election processes are defined in the organization's bylaws. Although nonprofit boards are composed of volunteers, board directors may be reimbursed for related expenses but are not paid for their expertise. Most boards have a chairperson, chief executive officer (CEO), or president who leads meetings to determine the organization's direction.¹⁴ Boards also typically include a vice chairperson or vice president to take over for the president or chair in their absence while maintaining other specific responsibilities.¹⁵ A board must be made up of qualified, experienced members and officers while avoiding conflicts of interest due to individuals' roles in creating organizational policies.¹⁶

The board's primary duty is to hire an executive director. Similar to a for-profit CEO, the executive director receives instructions from the Board at meetings in order to carry out the organization's mission.¹⁷ While the board of directors establishes organizational policies, the executive director is responsible for implementing these policies by hiring staff.¹⁸ Additionally, certain types of communication between board

¹² Grobman, *The Nonprofit Handbook*, 37

¹³ *Ibid*, 37

¹⁴ *Ibid*, 37

¹⁵ *Ibid*, 37

¹⁶ *Ibid*, 44

¹⁷ *Ibid*, 44

¹⁸ *Ibid*, 45

members and staff are inappropriate (e.g., a board member assigning duties to a staff member) because the executive director is responsible for delegating tasks.¹⁹

The process of staffing a nonprofit is influenced by the organization's mission, size, and budget. Some nonprofits operate effectively with no paid staff, whereas others depend on hundreds of staff members. Nonprofits usually run on a tight budget; therefore, the executive director must be equipped to perform all organizational operations if needed.²⁰ If a nonprofit can afford additional staff, there may be an assistant director who is responsible for membership, publications, and development. Other common staff members include a government relations representative, program director, relations specialist, administrative assistant, public relations specialist, librarian, and curator.²¹ Many nonprofits start small and identify growth needs in their strategic plan.²² Depending on the budget, staff positions can be full-time, part-time, or on a volunteer basis. As in for-profit businesses, staff positions in nonprofits can be seasonal as a means of maintaining a lower staffing budget.

¹⁹ Ibid, 45

²⁰ Ibid, 241

²¹ Ibid, 241

²² Ibid, 48

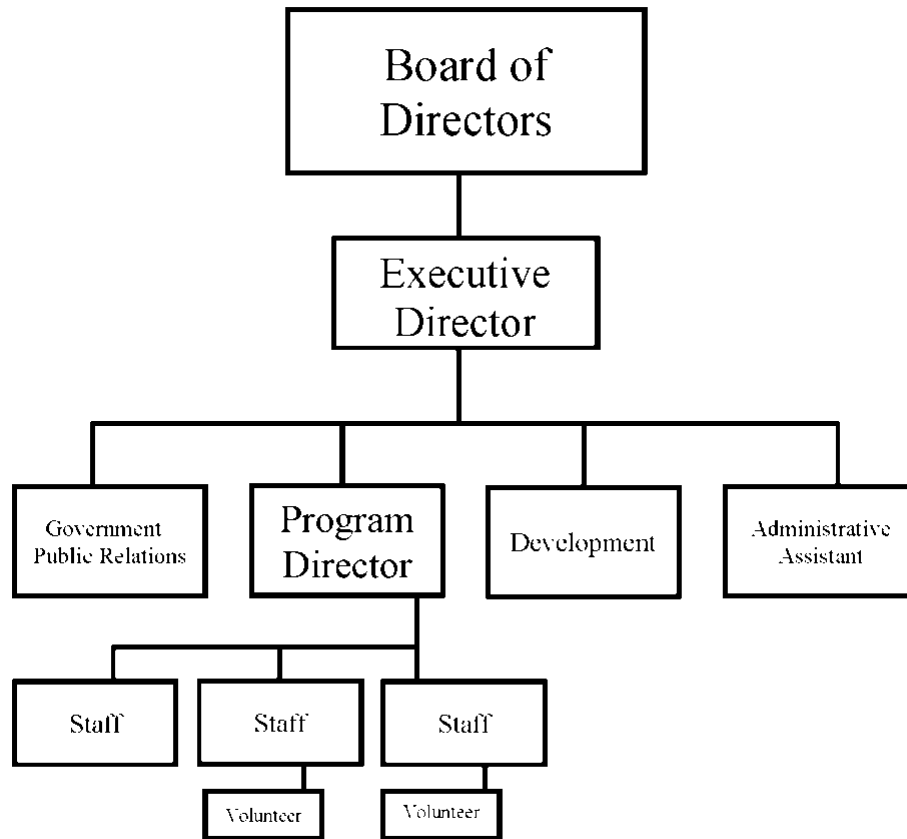


Figure 1. Typical nonprofit business organization flow chart (created by author)

Nonprofit Policies and Practices

Like for-profit businesses, nonprofit organizations have mission and vision statements to maintain a focus on the purpose for which an organization was created. In essence, “the mission statement should be a succinct description of the basic purpose of the organization, including the nature of the work to be carried out, the reason it exists, and the clients and constituencies it is designed to serve.”²³ This statement can also include the organization’s guiding principles and values. The vision statement’s “purpose is to convey the ideal future of the organization – what it hopes to become in the eyes of

²³ Ibid, 47

its board, staff, and stakeholders.”²⁴ The statement can also indicate the organization’s place in society and intended growth to serve as inspiration for achieving organizational goals.

Nonprofits use a strategic planning process, akin to a business plan, to advance their mission. This plan helps nonprofits look toward the future to establish goals aligned with vision and mission statements. A strategic plan should contain multiple elements: an executive summary; mission and vision statements; the organization’s planning processes, history, and profile; a situational analysis, goals, and objectives for the current year and the next three; and an implementation timeline. Components of the planning process should include the current and a five-year projection of staff and volunteer patterns, an organizational budget, revenue sources, marketing strategies, physical plant/equipment plan, and a schedule for updating and evaluating the plan. A strategic plan should also list the organizational profiles of current staff and plans for the next few years. An effective plan will outline staff roles (as either paid employees or volunteers).²⁵ Human resources can then establish a strategy for coordinating an organization’s administrative functions. Having an established hierarchy promotes staff effectiveness.

Given the requirements to have bylaws, a board of directors, a strategic plan, and communicative staff, 501(c)(3) historic preservation organizations have a solid base from which to sustain historic properties. However, a nonprofit is only as good as its foundation: if these aspects are taken lightly, or if leadership fails, an organization’s mission and vision can go unfulfilled. The organization may even neglect to maintain

²⁴ Ibid, 48

²⁵ Ibid, 48

what it was created to protect—a historic property. Numerous obstacles face nonprofits as described below.

Nonprofit Challenges and Capacity Building

A nonprofit is underpinned by a social mission based on the organization's capacity, consisting of multiple types of activities designed to enhance a nonprofit's ability to achieve its mission and to sustain itself. This capacity-based existence is crucial for the success of any nonprofit. Several areas are integral to capacity building and should be considered when defining organizational success (i.e., an organization's ability to meet its mission). Among the various categories of capacity building, organizational development, program development, revenue development, leadership development, and community engagement are five major dimensions that can challenge a nonprofit.²⁶

Organizational development entails the systems that underlie effective organizational functioning. This dimension concerns processes related to an organization's human resources, financial management, mission, planning, governance and legal compliance, policies and procedures, and information technology.²⁷ In effect, a nonprofit's daily routines are essential to its success. Organizational development is hence paramount to an organization's endurance.

Falling under organizational development is the nonprofit's mission (i.e., the basic purpose of the organization), which outlines the nature of work to be carried out. A nonprofit's mission sets the tone for everyday operations. This mission can include the

²⁶ Amy Minzner et al., "The Impact of Capacity-Building Programs on Nonprofits," *Nonprofit and Voluntary Sector Quarterly* 43, no. 3 (2013): pp. 547-569, <https://doi.org/10.1177/0899764013491013>.

²⁷ Minzner et al., "The Impact of Capacity-Building Programs on Nonprofits," pp. 547-569.

organization's principles and values. These components' definitions heavily influence organizational policies and procedures. The same can be said of the vision statement, which conveys the organization's ideal future: this statement shapes the nonprofit's sustainment by establishing its place in society, guiding intended growth, and serving as inspiration to accomplish the organization's objectives.

Because nonprofits engage in strategic planning to advance their missions, capacity building through organizational development will keep an organization on task. The strategic plan acts as a guide to realize goals in the vision and mission statements. Within the strategic plan, the nonprofit should have an executive summary, mission and vision statements, processes used for planning, history, organizational profile, situational analysis, goals, and objectives for the current year and the next three, and a timeline for implementation. These components are part of the organizational development capacity-building process used for planning.

Also within the strategic plan is a list of the organizational profile of current staff and plan for the next few years, which is effective for human resources to be able to establish a strategy for coordinating and directing the administrative functions of an organization. By having an established hierarchy, an organization will have an effective and successful staff. The staff hierarchy should also appear in the nonprofit's bylaws. Successful nonprofits have governing regulations that establish a board of directors, executive director, strategic plan, and staff. These tasks render capacity building through organizational development fundamental to a nonprofit's success.

Program development supports effective service delivery, including processes related to outcome evaluation, client satisfaction, and service expansion or

improvement.²⁸ Without sound programming and services, a nonprofit organization will fail in its mission due to not reaching its goals. Nonprofits must also be able to evaluate the impact of programming in order to evolve. Programming can consist of resources offered to provide a service (or related set of services) to the public. Each program should be associated with one or more of the mission's goals, thereby contributing to the organization's vision. Many programs are developed during strategic planning to keep the nonprofit on course. The strategic plan thus serves as the basis for how the organization's mission and goals can be met in addition to informing program guidelines.

Because programming emerges from strategic planning, program development is a major factor in a nonprofit's success. Well-developed programs include necessary resources along with a process outlining how the program will be carried out, the people or places to be serviced, and benefits for the public from engaging with such services.²⁹ For nonprofits in historic preservation, programs should be property-centric (e.g., with respect to preservation planning or educational projects) to foster the public's appreciation of preservation-related goals and to encourage preservation at the local level.

Programming also needs to be evaluated to ensure that the nonprofit's goals are being reached. Capacity building in terms of program development can create indicators to verify a program's success. If programming is routinely reviewed, then success metrics should be easy to establish. For example, an outside consultant could track plan implementation; evaluations could also be solicited from service recipients to assess

²⁸ Kennard T. Wing, "Assessing the Effectiveness of Capacity-Building Initiatives: Seven Issues for the Field," *Nonprofit and Voluntary Sector Quarterly* 33, no. 1 (2004): pp. 153-160, <https://doi.org/10.1177/0899764003261518>.

²⁹ Grobman, *The Nonprofit Handbook*, 27

whether their needs are being met. Programs should be evaluated on a regular basis to determine whether outcomes are being achieved (and how efficiently).

Funding is an effective programming resource, and program development can directly affect revenue if unsuccessful. Revenue development underlies an organization's funding and resource support, including diversification of funding sources, financial stability, and donor development.³⁰ Healthy income sources and an understanding thereof can aid an organization in outlining attainable goals; the absence of such elements can lead to an organization's swift end due to financial collapse. Comprehending and monitoring the organization's funding will aid in financial stability and organizational endurance. Nonprofits often receive funding through avenues such as membership dues, events, merchandise, individual donations, grants, and fundraising. Diversifying revenue affords a nonprofit greater financial stability. Partnerships, which also help expand revenue, can be established through networking with donors, members, corporations, and government bodies. Revenue development helps a nonprofit grow while boosting funding and advancing the organization's mission.

However, a nonprofit without an understanding of income streams and other available revenue sources can overextend itself financially. The organization's mission may still be met although the nonprofit might be carrying more debt than it can repay (e.g., if loans are used). A yearly budget is ideal for revenue development and overall expense tracking. Establishing revenue plans that enhance the effectiveness of the organization's mission will inform financial goals to maintain the nonprofit's success.

³⁰ Minzner et al., "The Impact of Capacity-Building Programs on Nonprofits," pp. 547-569.

Overall, engaging in institutional planning, setting fundraising goals, and maintaining an annual budget are keys to capacity building in revenue development.

Leadership development goes hand in hand with organizational development; the former involves professional and career development, board and volunteer recruitment and development, and succession planning.³¹ Nonprofit management is central to an organization's success. The capacity for leadership development is similarly important for organizational sustainment. Without career development guidelines, leadership can become stagnant and wane over time. This situation can result in high staff turnover and hurt recruitment. Leadership development also bolsters individuals' abilities in roles such as management both now and in the future. Nonprofits are more apt to succeed when they focus on helping their staff be successful, thus upholding the organization's mission while alleviating problems with staffing and recruitment. Nonprofit staffing is based on the organization's mission, size, and budget, meaning that some nonprofits can operate well with a small management structure. The nonprofit's size can also determine the amount and types of leadership development offered. Healthy capacity building in leadership development ensures that the nonprofit will have optimal management for leadership. Succession planning is also vital to a nonprofit's success; some staff possess a wealth of expertise to be shared with others. Successive leadership development should be grounded in knowledge and history while considering future leadership.

Community engagement revolves around community needs assessment, community asset mapping, marketing development, strategic partnership development, and the leveraging of resources and collaborative relationships.³² A nonprofit's client is

³¹ Ibid

³² Ibid

the community; essentially, nonprofits seek to fulfill community needs. Working with community partners creates goodwill that can be used for the greater good, which will keep an organization on track in its mission and goals. Nonprofits can establish community relationships by offering services and programs. Importantly, programming should meet an organization's mission while bearing the community in mind. The community established by a nonprofit could be rooted in interest groups, citizen groups, a geographic location, and/or an affiliation or identity.³³ For a nonprofit working with a historic property, the community is the surrounding geographic area as well as groups interested in historic preservation. The community is effectively the consumer; its needs, as established by the nonprofit, are met through the organization's mission and programming. Collaboration with community partners is pivotal for successful capacity building through community engagement. The resultant support system can be used to benefit both the community and the nonprofit (e.g., in pursuing its mission). Community engagement capacity building continually molds a nonprofit's vision to promote constant progress.

Capacity-building assessment keeps a nonprofit healthy by maintaining a strong infrastructure. This infrastructure enables greater organizational impact. In sum, nonprofits that invest in capacity building can develop better implementation processes to operate more effectively. Table 1 summarizes key aspects of nonprofit organizations' best practices and capacity building. An overview of historic preservation and key success measures are provided in the ensuing subsection.

³³ Ibid

Table 1. Summary of Key Aspects of Nonprofit Organization Capacity Building

Capacity:	Organizational Development	Program Development	Revenue Development	Leadership Development	Community Engagement
Potential challenges / Potential areas of growth	<ul style="list-style-type: none"> - Concise daily routines and operations - Policies - Management structure 	<ul style="list-style-type: none"> - Impactful programming - Effective service delivery - Evolving programming 	<ul style="list-style-type: none"> - Diverse funding sources - Financial stability - Donor development 	<ul style="list-style-type: none"> - Professional and career development - Volunteer recruitment - Succession plans 	<ul style="list-style-type: none"> - Assessment of community needs - Marketing development - Strategic partnerships

Historic Preservation

Historic preservation is the process of identifying places and objects of historical and cultural significance and preserving them for future generations, be they stories or tangible buildings, landscapes, archaeological artifacts, or museum collections.

Preservation can be accomplished through many means. Historically, small organizations, individual advocates, and grassroots campaigns employed their own strategies in the absence of official guidance regarding best practices until the 1960s.

Each country has its own philosophy on preservation, and the United States is no exception. The country took two approaches to preservation—private-sector and government involvement—in a period known as the Preservation Movement. In the 1850s, the Mount Vernon Ladies’ Association (Virginia) created the first house museum by physically restoring and preserving George Washington’s Mount Vernon. This achievement, part of the Women’s Preservation Movement, laid the groundwork for other women’s organizations to preserve properties they deemed important to America’s

history. NSDAR is one organization that continued in the path of the Mount Vernon Ladies' Association along with the National Society of the Colonial Dames of America.³⁴

In 1916, the United States Department of the Interior established the National Park System as the first federal system to address natural and cultural resource conservation in the country. The system was meant to handle sites far too large for a single organization. The Historic American Building Survey (HABS) program was created in 1933 with relief funds from the Federal Emergency Administration of Public Works to identify and document important American buildings through study, measurements or architectural drawings, pictures, and photographs.³⁵

Private- and public-sector efforts merged in 1949 with the establishment of the National Trust for Historic Preservation and the passage of the National Historic Preservation Act of 1966.³⁶ Inspired by Britain's National Trust, the 1966 act of Congress linked the preservation efforts of the National Park Service, the federal government, and activities within the private sector and at the local level. The purposes of the National Trust were to acquire and administrate historic sites of national significance and to encourage public participation in their preservation.³⁷

The National Historic Preservation Act of 1966 is considered the most powerful historic preservation legislation passed by Congress: it established the National Register of Historic Places, promoted the concept of locally regulated historic districts, authorized enabling legislation to fund preservation activities, mandated the selection of qualified

³⁴ Norman Tyler, Ilene R. Tyler and Ted J. Ligibel, *Historic Preservation: An Introduction to Its History, Principles, and Practice*, (New York, NY: W. W. Norton & Company, 2018), 39

³⁵ Tyler, Tyler and Ligibel, *Historic Preservation*, 47

³⁶ *Ibid*, 37-67

³⁷ *Ibid*, 50

state historic preservation officers (SHPOs), established the Advisory Council on Historic Preservation (ACHP), and stipulated that federal preservation programs and policies shall rely on the voluntary cooperation of historic properties and not interfere with their private ownership rights.³⁸ Historic preservation then became a more integral part of American society. The passage of this act also spurred unforeseen interest and involvement at the local and state levels and broadened the concept of preservation to offer public programs around education and advocacy.

Historic Preservation Standards

The Secretary of the Interior's Standards for the Treatment of Historic Properties (the "SOI Standards"), established in 1983, provide guidance on the successful physical preservation of historic properties and places.³⁹ The SOI Standards include four approaches to the treatment of historic properties: preservation, rehabilitation, restoration, and reconstruction. Each approach has a set of accompanying guidelines (see Table 2). The standards are mainly advisory but are nonetheless used by Federal Agencies, State Historic Preservation Offices, and Planning and City Commissions in designing historic districts and in shaping these entities' design review processes. The SOI Standards are regulatory for all grant-in-aid projects assisted through the National Historic Preservation Fund.⁴⁰ Because the Standards are applied in numerous ways, they are useful in

³⁸ Ibid, 59

³⁹ Ibid, 150

⁴⁰ The Secretary of the Interior's Standards for the Treatment of Historic Properties, National Park Service, U. S. Department of the Interior, Last modified January 2022 Accessed January 25, 2022. <https://www.nps.gov/tps/standards.htm>

determining whether an organization has been successful in its historic preservation endeavors.

When assessing property preservation, it is first necessary to discern whether the SOI Standards are being used—and, if so, whether the appropriate treatment guideline is being followed. Per the Standards, “Preservation focuses on the maintenance and repair of existing historic materials and retention of a property's form as it has evolved over time. Rehabilitation acknowledges the need to alter or add to a historic property to meet continuing or changing uses while retaining the property's historic character. Restoration depicts a property at a particular period of time in its history while removing evidence of other periods. Reconstruction re-creates vanished or non-surviving portions of a property for interpretive purposes.”⁴¹ The choice of treatment will depend on circumstances ranging from the property’s historical significance, physical condition, and proposed use to its intended interpretation. These factors should be considered before any physical preservation is undertaken.

Table 2. Summary of Key Aspects of Historic Preservation Under the SOI Standards

Standard:	Preservation	Restoration	Rehabilitation	Reconstruction
Summary:	The process of sustaining the existing form, integrity, and materials of a historic property	The process of accurately depicting the form, features, and character of a property as it appeared at a particular period of time	The process of making possible a compatible use for a property while preserving historically significant portions or features	The process of depicting, by means of new construction, the purpose of replicating an appearance at a specific period of time

⁴¹ The Secretary of the Interior’s Standards

Key Approaches to Managing Historic Properties

Other aspects must be considered regarding nonprofit organizations that manage historic properties. First, it is essential to identify whether historic preservation is in the organization's mission; if so, is preservation the organization's sole purpose or one of many? Each organization should have a mission or vision statement that addresses this matter for its historic properties. If an organization cites historic preservation in its mission, another issue can arise if experts are not available to help the nonprofit achieve its physical preservation goals or advocacy and fundraising for the cultural resource it is physically protecting. A preservation plan can accomplish these aims (see Table 3 for a summary). This plan reflects a process through which physical preservation is prioritized by defining a course of action that enables an organization to set its current and future agenda (ranging from as few as five years to as many as needed) to preserve the property. The plan should also present any actions the organization will take along with a timeline for resources and funding to be allocated for each preservation need.⁴² A nonprofit can devise a preservation plan that meets SOI Standards with assistance from people knowledgeable about preservation. For instance, staff members familiar with the Standards (i.e., the director, a Board of Trustees member, or a volunteer) can help manage the organization's historic property and achieve its mission.

The nonprofit could also consult with other individuals or organizations in the field if no full-time staff or volunteers are available. Consultants might have hands-on experience or belong to a firm specializing in the care of historic properties. Notably,

⁴² Tyler, Tyler and Ligibel, *Historic Preservation*, 255-256

plan creation should not be the only time an expert is employed; experts should also aid in plan implementation to facilitate the work.

A preservation plan also outlines how to obtain funding for long-term care of the historic property. Funding sources could include established funding pots or additional fundraising guided by the best use of funds as determined in the plan. Without a mechanism for funding ongoing preservation, a preservation plan is essentially futile. The nonprofit will also be unable to fulfill its mission and thus will not be successful.

This plan, together with the nonprofit’s capacity building, should offer a governance structure that maintains a sense of consistency in light of the property’s preservation. Staff turnover is frequently associated with business, with sales departments often having the highest turnover rate.⁴³ Turnover in nonprofits usually affects the board of trustees due to term limits; it should not influence the physical preservation plan given a proper management structure. Issues related to a consistent governance structure should be lessened with content staff as established via leadership development capacity building.

Table 3. Summary of Key Approaches to Managing Historic Properties

Key Approaches:	Established Preservation Goal	Preservation Planning	Preservation Standards	Consistent Governance
Summary:	Needs to be listed in the organization’s mission or vision	A preservation plan devised by experts in the field	Commitment to meeting the SOI Standards	Leadership development capacity building to reduce turnover

⁴³ TL, *Startup Merchandising Business Ideas*, 24

Nonprofits That Manage Historic Properties

Historic preservation is no easy feat; it is often accompanied by difficulties such as shifting revenue. The task becomes even more challenging for a nonprofit organization seeking to make an impact in historic preservation. Raising capital in the nonprofit world is arduous: nonprofits must have a clear mission to find donors and grantors willing to invest in strong, mission-oriented organizations with a track record of positive outcomes. A nonprofit can develop preservation projects to create cash flow to support continuing preservation activities in various ways. Nonprofit law and tax issues are highly complex, not unlike preservation law, and call for due diligence and creativity. Historic preservation nonprofits commonly consult with attorneys and accountants, which can also necessitate funding that organizations might not have. A nonprofit is a public charity that must choose a mission.⁴⁴ Preservation-oriented nonprofits focus on topics spanning from historic preservation education to historic properties themselves. Nonprofits looking to succeed in the historic preservation space need a charitable mission that makes sense to potential donors and the IRS.

After becoming established, historic preservation nonprofits must contemplate their points of advocacy and what they aim to accomplish. Physical preservation is an evolving concept. A property requires maintenance even as it is being preserved. The use of a historic structure also warrants consideration. For instance, museum space should be restored or preserved—not rehabilitated to serve a purpose in the current environment, only to be addressed for restoration at a later date. A preservation plan is therefore typically more important than a strategic plan to a historic preservation nonprofit. A

⁴⁴ Grobman, *The Nonprofit Handbook*, 37

preservation plan could even function as a strategic plan, depending on information gathered during the planning phase.

Some nonprofits raise revenue through grants specifically for historic rehabilitation and preservation. These grants are highly competitive and are not exclusive to nonprofits. Like other nonprofits, a historic preservation nonprofit can take out a loan for funding. Fundraising presents another option to build capital for preservation efforts.

Historic preservation nonprofits may become involved in historic preservation and rehabilitation in multiple ways, each of which has advantages and disadvantages. Nonprofits have played a large part in saving historic buildings in the past. These organizations advocate for historic preservation, which further determines their success. Overall, the programming of nonprofits with historic properties should be driven by both property preservation and historical significance. Approaches can include programming related to a property's history, an overview of past preservation techniques, or the organization itself. Revenue development focuses on property preservation and preservation-related education. Community engagement is critical to effective preservation and can be realized through a nonprofit's role in the community and historical ties to the area. If an organization's capacity-building efforts fail, then its associated property may also become endangered, ultimately jeopardizing the nonprofit's future. The next chapter presents several case studies to begin to answer the research questions concerning elements identified in this chapter. The studies help to clarify how nonprofit management and preservation affect historic properties.

CHAPTER III

CASE STUDIES

Case studies allow for collecting of information from a range of materials rather than a single source. This research method allows scholars an opportunity to gain knowledge about a subject while reducing potential bias. Robert Yin defined a case study as “an empirical inquiry that investigates a contemporary phenomenon within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident.”⁴⁵ Case studies offer several valuable outcomes: a focus on the embeddedness of a case in its context; the capacity to explain contributing links; the abundant information that comes from using multiple sources; and the ability to generalize to theory. This method has been widely adopted to identify key statistics based on using comparative questions to gather specific information on a broad scale.⁴⁶ Importantly, qualitative data obtained through the case studies in this chapter can inform other preservation researchers’ endeavors.

This chapter explores how several historic properties under the care of Georgia nonprofits are managed. The resultant data help to answer the research questions. Limited case studies were performed to control the number of historic properties under review. Criteria were defined to identify sites, and a uniform methodology was employed at each location.

⁴⁵ Robert Yin, p. 5

⁴⁶ Robert Yin, p. 1-15

Criteria

The following criteria were applied to determine optimal case study sites. Each site needed to be 1) located in the state of Georgia and 2) owned by a state or local nonprofit management organization. The nonprofit overseeing each site was required to 3) manage a historic property with standing features; 4) have preservation as either its sole or one of a few missions; 5) have a plan for funding/revenue development; and 6) have policies/written guidance for the property.

Six sites were chosen and evaluated on the state and local levels to determine how guidance about historic preservation and site management was or was not being disseminated and implemented. Each site had a parent nonprofit expected to set the precedent for the site as part of a nonprofit conglomerate. The focal sites were as follows:

1. Meadow Garden, Augusta, Georgia
2. Howard Manor, Wrens, Georgia
3. The Hay House, Macon, Georgia
4. The Boyhood Home of President Woodrow Wilson, Augusta, Georgia
5. Harper Fowlkes House, Savannah, Georgia
6. Andrew Low House, Savannah, Georgia

Methodology

All case studies were evaluated using the same methodology. For each case, I first conducted background research on the site, including a review of source materials to craft a brief development narrative and a history of the organization. I also assembled an

overview of the nonprofit's business structure, namely in terms of nonprofit management and historic site preservation management. Some information was unavailable, and interviews with directors or site managers were performed to fill knowledge gaps; a series of questions were posed on nonprofit organization best practices and preservation best practices. Appendix A contains a list of all questions. Responses are summarized throughout this chapter with full answers available in Appendix A. Each organization's Form 990 was referenced to obtain details about the nonprofit's programs, mission, funding levels, and staff. Each case study concludes with a review of key points.

Case Study Site #1

Meadow Garden, Augusta, Georgia

Historic Site Brief History

Owned and operated by GSSDAR, Meadow Garden was originally the home of George Walton, one of Georgia's three signers of the Declaration of Independence. Although the house was purchased first by the National Society in 1901, they gave GSSDAR ownership of it in the 1960s. The site then cycled through several changes and owners prior to being owned by the GSSDAR and becoming Georgia's oldest house museum.⁴⁷

George Walton was born in Virginia in 1749 but moved to Savannah, Georgia in 1769 to study law. In February 1776, he was elected a delegate to Continental Congress,

⁴⁷ Cecil McKithn, "Meadow Garden George Walton House," National Register of Historic Places Nomination Form (Washington, DC: U.S. Department of the Interior, National Park Service, 1976), Section 8.

arriving in Philadelphia in time to sign the Declaration of Independence on July 4, 1776. Walton, at 26 years old, was one of the youngest signers. Walton became Chief Justice of the Georgia Supreme Court after the war, serving from 1783 until 1786; he was elected to this position again in 1793. Walton continued his public service as Governor of Georgia in 1779 and again in 1789; as United States Senator from 1795 to 1796; and as Judge of the Superior Court from 1790 until his death. His career was remarkable because he served in all three government branches—legislative, executive, and judicial. Walton moved to Augusta in 1787 and made Meadow Garden his home until his death on February 2, 1804.

Walton had personal financial problems after the Revolutionary War and therefore never listed the title of Meadow Garden under his name. The property instead was listed as “held in trust by Robert Watkins, Walton’s nephew, for Walton’s son, George Walton, Jr.”⁴⁸ The property changed hands several times after George Walton, Jr. sold it in 1812.

The house started as a two-story hall-and-parlor plan on more than 200 acres and remained in this configuration while Walton lived there. The interior of the house is uncommon for one found in the lower southern part of America, as the chimney is in the center of the house. The chimney in lower southern houses is normally on an exterior wall, but Meadow Garden is typical of a more northern type of house form intended to keep the warmth of the fire in the center of the home. This arrangement may have been chosen because Walton was from Virginia and had a hand in the plans.⁴⁹

⁴⁸ “History,” Georgia State Society Daughters of the American Revolution, Last modified October 11, 2019, Accessed June 3, 202, <https://historicmeadowgarden.org/>

⁴⁹ “History.”

American hall and parlor house floor plan

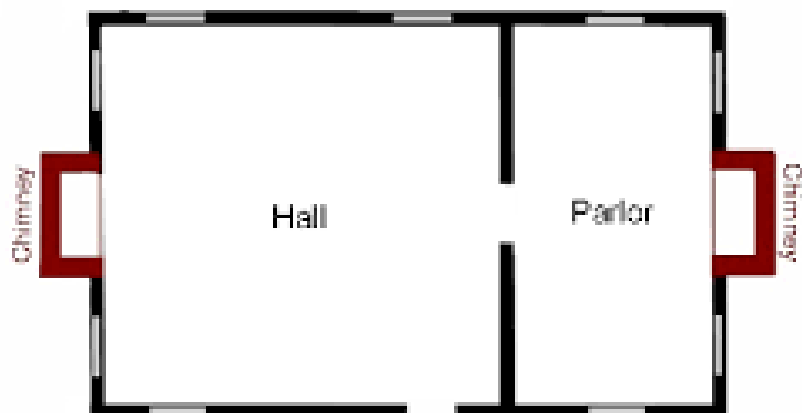


Figure 2. Typical hall parlor plan (Altairisfar's Images, <https://commons.wikimedia.org/wiki/User:Altairisfar>)

The exterior of the house is in a Georgian style with a symmetrical design and classic proportions. The two double-hung sash windows, along with small panes of nine over nine windows on either side of the centered door and staircase, exemplify this style. Although the house exterior is wood siding and brick, this design could have been original; these materials would have been available at the time the house was built.⁵⁰

Prior to the GSSDAR's involvement with the house, the plan shape had been altered to that of a two-story Georgian plan while the front of the house was kept in two styles: the left side was in a Georgian style, whereas the right-side addition was in a Federal style. The addition added a new door as well as a porch to match the front of the original, although at two heights. The new double-sash windows were not nine over nine but were instead six over six. Dormers were added to the roof of the Federal-style side.

⁵⁰ Ibid

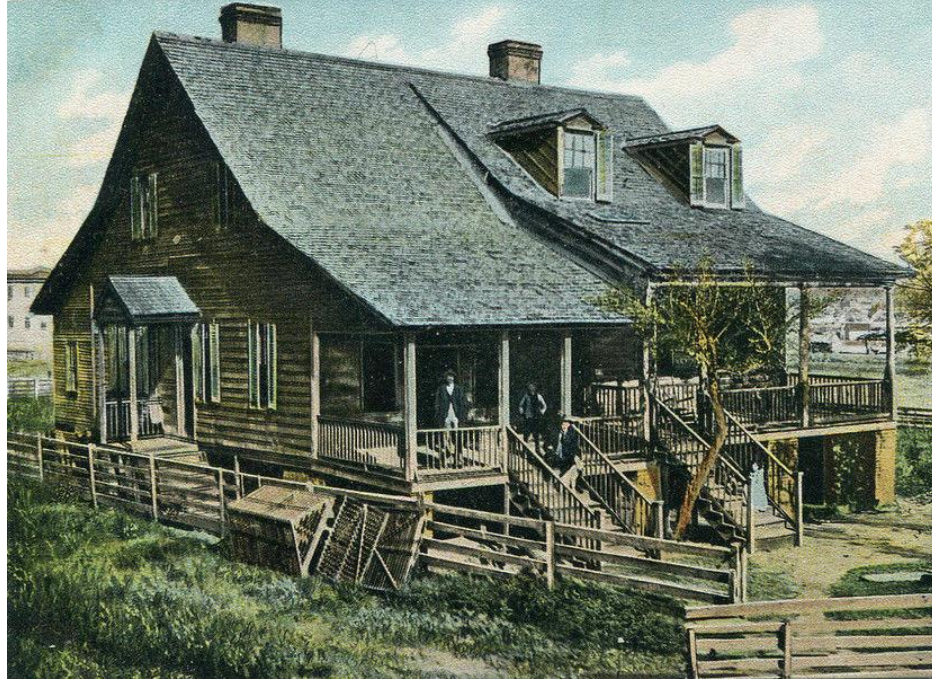


Figure 3. Meadow Garden, c. 1890s (GSSDAR Archives, <https://archives.georgiastatedar.org/collections/>)

Not until the 1890s, when NSDAR organized under new principles, did the organization seek to preserve the house originally owned by Walton. The Augusta Chapter of NSDAR (Georgia) was organized February 20, 1892. One member, Harriet Gould Jefferies, was instrumental in the push to save the house just three years later. Jefferies learned that the house was to be demolished and brought the idea of purchasing the property to fellow chapter members. The price was high for the rundown property, and the Augusta Chapter could not afford to purchase it on its own for the asking price of \$2,500. Jefferies spread the word to other Georgia Chapters for help to salvage and restore the home. At its organizational meeting in May 1895, GSSDAR after formal organization sent delegates to the National Society's annual Continental Congress in 1898 to ask for assistance with the purchase. After the National Society approved the

request, they created the Meadow Garden Committee and appointed the Augusta Chapter Regent the national chairman for the committee.

Preservation efforts at Meadow Garden were among the nation's earliest, although the changes would not be considered preservation or in keeping with the property's historic character by today's SOI Standards. 'Preservation' efforts began immediately under the Augusta Chapter with help from GSSDAR. The early 1900s saw Meadow Garden transformed into what is known as a Sand Hills cottage, a style particularly common in the Summerville area of Augusta. The Augusta Chapter of NSDAR removed the asymmetrical porch and created a level porch with Doric columns extending across the entire front. Several other changes were made to give the house a more uniform appearance, including altering the rooflines, adding dormers, and creating an area under the raised front porch. Because the Augusta Chapter used the house as a meeting space for chapter meetings, for practical purposes they added a kitchen area and a bathroom to the back of the house, giving the house indoor plumbing.



Figure 4. Meadow Garden, c.1900s (GSSDAR Archives, <https://archives.georgiastatedar.org/collections/>)

The Augusta Chapter, tasked with the upkeep of Meadow Garden, ultimately found the property too difficult to maintain as the sole custodian. At the 1960 Georgia State Conference, a motion was adopted and then brought to the 1960 Continental Congress: Meadow Garden was entrusted to GSSDAR, including all responsibilities involved, one of which was obtaining a charter for GSSDAR to become owner of the property.⁵¹ The State Regent then created a new state board for Meadow Garden that would constitute the State Regent, State First Vice Regent, State Chairman for Meadow Garden, and three trustees. A motion was also passed stating that annually, state dues would contribute to the maintenance of the property. Meadow Garden remains owned and operated by GSSDAR and has seen modifications in keeping with preservation standards as the Society has learned more about historic preservation and the buildings' original conditions.

Nonprofit Owner Brief History

GSSDAR was founded during the winter of 1891 by the appointment of the first State Regent, Mrs. Augustus Ramon Salas.⁵² This nonprofit is a heritage society whose membership is limited to women 18 years or older of direct lineal descendants of soldiers

⁵¹ Mrs. S. M. Page Rees, Proceedings of Georgia State Conference of the National Society of the Daughters of the American Revolution, (1960-1961), Accessed September 15, 2021, https://archives.georgiastatedar.org/themencode-pdf-viewer/?file=https://archives.georgiastatedar.org/wp-content/uploads/2020/04/GSSDAR_Proceedings_1960-1961_pgs1-40.pdf, 82

⁵² Helen E. Woodward, Proceedings of Georgia State Conference of the National Society of the Daughters of the American Revolution, (May 23 and 24, 1899), Accessed November 23, 2020. https://archives.georgiastatedar.org/themencode-pdf-viewer/?file=https://archives.georgiastatedar.org/wp-content/uploads/2018/03/GSSDAR_Proceedings_1899-1902_08162017.compressed.pdf, 13-14

or others of the Revolutionary period who aided in the cause of independence.⁵³ The organization's motto is "God, home and country."⁵⁴

GSSDAR was formed after some local chapters had been established within the state of Georgia. According to Mrs. S. B. C. Morgan, "State organization is necessary to bring the society to the fullest development in the State."⁵⁵ The idea was to give more authority to the states and to reduce the excessive power, labor, and expense on NSDAR. GSSDAR'S first State Conference was held during the Atlanta Exposition in 1899, which helped the Georgia Daughters come together for the "conductive growth of the society and productive of great good."⁵⁶ Regents of local chapters within Georgia were able to report on their chapters' success and share ideas for programs to help NSDAR's mission.

Nonprofit Business Structure

The GSSDAR's current management structure mirrors that of NSDAR but is a nonprofit organization separate from its parent organization, as stated in GSSDAR's bylaws. The state organization is built on volunteers who give their time to GSSDAR based on regulations set forth in the state bylaws; the management hierarchy is also listed in the bylaws.⁵⁷

GSSDAR's State Regent shall "be the chief executive officer (CEO) and the official spokesman for the State Society."⁵⁸ The State Regent is to have general

⁵³ "Become a Member," Daughters of the American Revolution. Last modified October 2, 2015, Accessed November 12, 2020, <https://www.dar.org/national-society/become-member/member-interests>.

⁵⁴ "Become a Member," Daughters of the American Revolution

⁵⁵ Woodward, Proceedings of Georgia State Conference, 14

⁵⁶ Ibid, 6

⁵⁷ Cook, Proceedings of the Georgia State Society, 199-208

⁵⁸ Ibid, 204

supervision of the affairs of the State Society and to preside at all meetings of the State Conference, State Board of Management, and the Executive Committee. GSSDAR works on a committee system.⁵⁹ The Society's administration has two-year terms of service, including committee members appointed by the State Regent. They serve a two-year term corresponding to her administration or until successors have been chosen. The State Regent, upon the start of her term, appoints a new body of committee members, including state chairs and vice chairs.⁶⁰

GSSDAR has committees for historic preservation, including a Meadow Garden Committee. This committee preserves Meadow Garden (the property and buildings) to increase awareness of and participation in Meadow Garden-focused activities so that the GSSDAR and their Georgia DAR chapters can share this historical landmark with as many people as possible. The State Regent's Project Committee is meant to build enthusiasm, raise funds, and promote service through the State Regent's Project. The current project is implementation of the *Master Plan for Historic Restoration and Preservation of Meadow Garden*.⁶¹

Management of the property is operated by GSSDAR under the direction of the State Regent. Meadow Garden now has a staff of one, the current director. The employee's title was originally House Manager and was filled by a local woman who could quickly be present as needed. During the Lingelbach Administration, the house manager retired, and the Meadow Garden Board voted to change the title to Director and conduct a search. Although vetted, the first director was not a good fit for the position.

⁵⁹ Ibid, 205

⁶⁰ Ibid, 204

⁶¹ "Georgia CIP," Georgia State Society Daughters of the American Revolution, Last modified July 1, 2021, Accessed July 5, 2021, <https://members.georgiastatedar.org/committee-page/>

The second hire was a good fit, but because State Regent Patton did not have a long-term strategy for historic preservation, a series of actions took place that stagnated the museum, leading the second director to leave. Her departure prompted GSSDAR to consult with preservation consultants from Landmark Preservation, LLC, a firm the organization continues to partner with today.

The current director is a local Georgia Daughter and is pursuing a Bachelor of Arts in History. She consults with the local preservation organization, Historic Augusta, Inc., for guidance. Twenty docents volunteer to give tours of the house museum. All docents are from local chapters of the Central Savannah River Area, comprising Georgia and South Carolina.

Organization's Form 990

GSSDAR's Form 990 shows the organization's tax-exempt status as 501(c)(3). The GSSDAR officers are listed, but the Director of Meadow Garden is not—perhaps because the director only deals with Meadow Garden and not the nonprofit as a whole. However, the organization did report having one employee, which would account for the director.⁶²

GSSDAR also listed its programming, which is identical to its mission statement: to “promote historic preservation, education, and patriotism through a variety of efforts including, supporting veterans and active military, giving awards and scholarships, and

⁶² United States Department of the Treasury, Internal Revenue Service, 2019 (Form 990), Georgia State Society National Society Daughters of the American Revolution (Washington, DC, 2019)

restoring Meadow Garden (the home of George Walton, signer of the Declaration of Independence) to better interpret the accurate history and share with the public.”⁶³

Capacity Building

Organizational Development

GSSDAR’s mission is “To promote patriotism, historic preservation, and education.”⁶⁴ These aims are accomplished through many aspects of the State Regents Project, committees, and fundraising. The director, while not part of the Meadow Garden Board, attends meetings to help ensure GSSDAR is following all legal compliance, policies, and procedures. The director also makes sure along with the Board that the house has proper funding and planning. Even though she is not on part of the organization’s mission, it is her job to make the museum a success during her two-year tenure.⁶⁵ The current State Regent is working with the director to make sure the nonprofit has up-to-date information technology; GSSDAR has recently engaged the historical community online to promote the museum and generate tourism. The Board also meets to discuss goals and plans for the historic property.⁶⁶

⁶³ United States Department of the Treasury, 2019 (Form 990), Georgia State Society National Society Daughters of the American Revolution (2019)

⁶⁴ “Georgia CIP,” Georgia State Society Daughters of the American Revolution

⁶⁵ Stephani Roohani Interview by R. Katherine Croft, May 1, 2021

⁶⁶ Stephani Roohani Interview

Leadership Development

The organization currently has no leadership development. The succession plans proceed through GSSDAR, from members of the Board who were present to other administration.⁶⁷

Program Development

The director helps with ideas for programming, but final decisions are left to the Meadow Garden Board. GSSDAR also used surveys and TripAdvisor, a U.S.-based online travel company featuring a website and mobile app with user-generated content and a comparison-shopping website, to gain visitor feedback and adjust their programming. Funding depends on the budget and revenue generated through program events.⁶⁸ The 990 Form shows that they spent \$216,661.00 on programming in 2019.⁶⁹

Community Engagement

The director and the Meadow Garden Board Member for Public Relations work on community engagement together. A revitalized mission for branding and online outreach was recently developed to engage the historical community via social media. This way, a community can be built to help with the organization's mission of education and historic preservation.⁷⁰ Meadow Garden's community partners are Historic Augusta,

⁶⁷ Ibid

⁶⁸ Ibid

⁶⁹ United States Department of the Treasury, 2019 (Form 990), Georgia State Society National Society Daughters of the American Revolution (2019)

⁷⁰ Stephani Roohani Interview

Inc. and the Georgia Trust for Historic Preservation (Georgia Trust). However, the city does not attract much tourism, hence the need for online branding.⁷¹

Revenue Development

Meadow Garden receives funding from several sources. Some money comes from GSSDAR dues, which every member pays. Current Director, Stephani Roohani, stated “Funding is always an issue because DAR is a nonprofit organization.”⁷² GSSDAR creatively amasses the remainder of its funding through State Regent’s Projects, donations, and grants. Unfortunately, grants are few and far between, and those that are available are highly competitive.⁷³ While operating expenses are covered by member dues, the Meadow Garden Committee recently developed an annual fundraising patron program where anyone—not just members—can be a patron. A gift shop is also located in the Heritage Education Center, which generates additional revenue.

Historic Site Preservation & Challenges

When NSDAR purchased the property, it was surrounded by less than one acre of land, and the Augusta Canal flanked the left side.⁷⁴ Currently the front, right side, and back are flanked by the Walton Rehabilitation Hospital Facilities, including the main road through, Independence Drive. During the early 2000s, the GSSDAR additions of the level front porch as well as the Sand Hills cottage-style additions were removed. Further, at the front of the building, the two different-level porches were reconstructed to more

⁷¹ Ibid

⁷² Ibid

⁷³ Ibid

⁷⁴ McKithn, “Meadow Garden George Walton House,” Section 8.

accurately portray the historic architecture during Walton’s occupation. A multipurpose Heritage Education Building was added to the property in 2004 to offer “heritage education and an interpretive center and storage area at Meadow Garden.”⁷⁵ More minor repairs were made to the house museum in 2013 under the Lingelbach Administration 2012–2014, including much needed painting and bathroom remodeling. The landscaping was altered between 2015 and 2016 under State Regent Fischer’s Administration 2014–2016, removing dead trees and roots that threatened the house’s foundation. A twelve-year preservation plan was drafted under the Patton Administration 2016–2018 and implemented by the Meadow Garden Board in 2018. Landmark Preservation, LLC was consulted and paid by the Board to create this plan for the State Society. The Meadow Garden Board, under the administrations that have followed the Patton Administration, have continued with this plan and have retained Landmark Preservation, LLC for consulting.⁷⁶ However, nothing in the GSSDAR bylaws or Meadow Garden Board’s standing rules dictate that this plan must be followed. An entirely new Meadow Garden Board is appointed when a new regent is installed every two years.

Meadow Garden is on the National Register of Historic Places, and is a National Historic Landmark. However, the National Register nomination and the National Landmark nomination are each inaccurate in their description of the house museum and periods of significance. The forms list the property as having the Sand Hills cottage style

⁷⁵ Sally McGlaun Baldwin, Proceedings of the Georgia State Society of the National Society of the Daughters of the American Revolution, (2002 –2003), Accessed September 22, 2021, https://archives.georgiastatedar.org/themencode-pdf-viewer/?file=https://archives.georgiastatedar.org/wp-content/uploads/2018/03/GSSDAR_Proceedings_2002-2003_09072017.compressed.pdf, 103-104

⁷⁶ Cook, Proceedings of the Georgia State Society, 51-53, 58-64, 81, 110

and only indicate the period of significance as 1791–1804.⁷⁷ Although both nominations mention George Walton, they fail to note the Women’s Historic Preservation Movement; if not for NSDAR, the house would have been lost. The Women’s Historic Preservation Movement must therefore be considered the second most important period of significance. This omission is presumed to have occurred because nominations were completed decades ago. The Georgia State Historic Preservation Office expressed willingness during the 2014–2016 Fischer Administration to help in correcting the form.



Figure 5. Meadow Garden, c. 2010s (GSSDAR Archives, <https://archives.georgiastatedar.org/collections/>)

⁷⁷ McKithn, “Meadow Garden George Walton House,” Section 8.



Figure 6. Meadow Garden, c. 2021 (GSSDAR Archives, <https://archives.georgiastatedar.org/collections/>)

Summary

Interview results and my personal experience as a GSSDAR member and former Meadow Garden board member suggest that Meadow Garden is in good hands and following a preservation plan. The plan, according to Landmark Preservation, LLC, has the GSSDAR restoring the museum to the original periods of significance on both the left and right sides. The left side will be restored to when Governor Walton lived in the building. This task is only part of the working preservation plan. No administration has wavered on conducting preservation work since the preservation plan's inception.

However, any regent can express approval or disapproval of an idea when it comes to preserving Meadow Garden. Based on my experience as a Meadow Garden board member with historic preservation knowledge, it is not always appreciated when professional input does not 'sit well' with a regent's personal bias and when social

politics get in the way. One regent can alter the preservation plan and other elements deemed important to the house museum.

GSSDAR mostly conducts closed-door meetings. Meadow Garden Board Minutes are not offered to the rest of the organization until proceedings are published annually. While the restoration process has been extensively documented for GSSDAR, individuals outside the organization would likely struggle to find all documentation. This lack of transparency hurts GSSDAR in terms of preservation stewardship, especially in helping local chapters. The same ‘popularity contest’ approach that is taken when choosing committee members occurs when a state chairman is selected; the appointment is not necessarily based on the person’s expertise but instead often reflects how well she knows NSDAR Board members. GSSDAR is a volunteer organization, and not every volunteer is proficient; she is occasionally only a body.

Case Study Site #2

Howard Manor, Wrens, Georgia

Historic Site Brief History

Howard Manor is currently owned and maintained by the John Franklin Wren Chapter, NSDAR in Wrens, Georgia. It serves as a chapter meeting house in its current capacity, but the local chapter is interested in rehabilitating the house for use as a history museum and rental property. The Chapter did not acquire the house until 1999. Research on the official provenance of the buildings is ongoing.⁷⁸

⁷⁸ Dr. Hanna Fowler, Howard Manor Master Plan, (Wrens, Georgia; John Franklin Wren Chapter, NSDAR 2020), 2

The property, in Jefferson County, Georgia, originally belonged to Mr. J. J. Streetman of Augusta, Georgia in the 1700s. The property changed hands several times until William Barrett sold it in 1879 to prominent Augusta businessmen, William T. & John S. Davidson.⁷⁹ They sold the property in 1887 to Glascock Barrett, who built the first structure on the property. He later sold the property to Dr. Charles Henry Raley from Warren County, Georgia. Raley attended the Medical College of Georgia in Augusta and was licensed to practice medicine in 1882.⁸⁰ The house that Raley built, which replaced the original structure, is the oldest residence built in what was then the corporation of Wrens in 1884. Built as a hall-and-parlor plan, the house was a single-story in a Gothic Revival style. A second structure was built on the south end of the property for use as Raley's medical practice.⁸¹

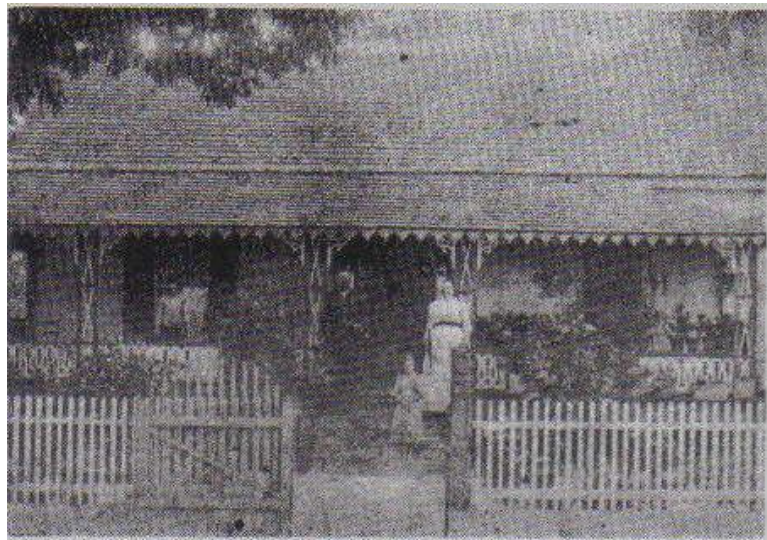


Figure 7. Raley House, 1880s (Howard Manor Master Plan, page 3)

⁷⁹ Howard Manor Master Plan, 2

⁸⁰ Ibid, 2

⁸¹ Ibid, 2

A fire broke out on an adjoining property in 1907, scorching the roof of the Raley house. A second-story addition was then built. A Colonial Revival style was applied with two front porches in 1910 with an exterior staircase on the side to access the second floor. At the time, the house was on Main Street in Wrens, Georgia. Raley met an untimely death in 1920 in a train wreck. His wife lived at the house until her death in 1926.⁸²



Figure 8. Howard Manor, 2010s (Howard Manor Master Plan, page 1)

Milo Howard, Sr. purchased the house in 1926. Howard Manor gets its current name from this family. In the 1960s, the property became a rental facility with additions to the back of the house for a commercial kitchen and dining room. Access to the second floor remained on the exterior by way of a staircase on the left side of the house. When the John Franklin Wren Chapter, NSDAR was organized in 1965, the nonprofit used the

⁸² Ibid, 3

house for its organizational meeting. This chapter then continued to use the house for chapter meetings. The estate remained in the Howard family until Milo Howard, Jr.'s death in 1999, when he willed the property to the John Franklin Wren Chapter, NSDAR with the reversionary request that if the Chapter failed to use it at least once within 365 days, it would go to the Wrens Cemetery Fund.⁸³

Since 1999, the John Franklin Wren Chapter, NSDAR has used the house as a chapter meeting location and as storage for chapter records, antique furnishings from the late 1800s and early 1900s, and a collection of local historical artifacts from Jefferson County and the city of Wrens. Members consider themselves the general custodians of the property. Yet they may not fully understand that they own the property outright and are responsible for all repairs and maintenance, covering just shy of one acre of land and the historic house.⁸⁴

Nonprofit Owner Brief History

As GSSDAR grew, new chapters were established in cities and towns throughout the state. Georgia also experienced a population increase in the 1950s, and more areas became less rural—including Wrens. The John Franklin Wren Chapter, NSDAR was in need, and this place met the fulfillment for a meeting space in the city.

In June of 1965, Georgia State Regent Mrs. Benjamin Ivy Thornton, “Accompanied by Mrs. I. H. Sutton, former regent of Tomochichi Chapter, motored to Wrens to meet with a group interested in forming a new DAR Chapter. Luncheon guest

⁸³ Ibid, 3

⁸⁴ Ibid, 4

of Mrs. Henry Lively at her home.”⁸⁵ In November of that year, Georgia State Regent Mr. Thornton accompanied another Georgia Daughter, Mrs. Frank M. Suttle, to Wrens to attend the organizational meeting of the John Franklin Wren Chapter at the home of Mrs. J. J. Pilcher. She installed the Chapter officers along with the organizing regent, Mrs. Henry Lively, as new regent.⁸⁶ The John Franklin Wren Chapter of Wrens was officially organized on November 27, 1965, with thirty members. GSSDAR reached ninety-five chapters at that point, the largest number in its history thus far.⁸⁷

The John Franklin Wren Chapter, NSDAR was confirmed by the National Board of Management on December 8, 1965. Members have since participated in their city-wide project of “Conservation and beautification.”⁸⁸ This initiative includes Howard Manor, the property willed to the Chapter by Milo Howard, Jr., which is used for chapter meetings.

Nonprofit Business Structure

The management of Howard Manor is conducted by the John Franklin Wren Chapter, NSDAR and is spearheaded by Chapter Regent Dr. Hanna Fowler. No formal management structure has yet been dedicated to the property, but a master plan exists. This chapter includes fifty members who volunteer to help with everyday cleaning and

⁸⁵ Mrs. Frank J. Campbell, Proceedings of the Georgia State Society of the National Society of the Daughters of the American Revolution, (1965 – 1966), Accessed December 27, 2020, https://archives.georgiastatedar.org/themencode-pdf-viewer/?file=https://archives.georgiastatedar.org/wp-content/uploads/2018/03/GSSDAR_Proceedings_1965-1966_09262017.compressed.pdf, 47

⁸⁶ Campbell, Proceedings of the Georgia State Society, 48

⁸⁷ Ibid, 65

⁸⁸ Ibid, 134

care of the house. The local Jefferson County High School Navy Junior Reserve Officer Training Corps does groundskeeping for the Chapter.⁸⁹

Organization's Form 990

Based on Form 990, John Franklin Wren Chapter, NSDAR, is listed as tax-exempt under 501(c)(3). The form lists Chapter officers but does not list other employees, as Dr. Fowler shared with me. The regent is listed as a “president” rather than by her correct title. Additionally, only the first four officers are listed instead of the entire board.⁹⁰

The programming of John Franklin Wren Chapter, NSDAR is intended to perpetuate the memory and spirit of the men and women who achieved American independence, to promote the development of an enlightened public opinion, and to foster patriotic citizenship. These objectives also apply to DAR.⁹¹ This chapter is reported as having eighty-seven members who meet once a month for eight months of the year with programs based on the National Theme of the month.

⁸⁹ Howard Manor Master Plan, 5

⁹⁰ United States Department of the Treasury, Internal Revenue Service, 2002 (Form 990), John Franklin Wren Chapter, NSDAR (Washington, DC, 2002)

⁹¹ United States Department of the Treasury, 2002 (Form 990), John Franklin Wren Chapter, NSDAR (2002)

Capacity Building

Organizational Development

No development has been initiated for Howard Manor specifically. There is hope that the local community can help with the master plan. The Chapter has not yet received guidance from GSSDAR.⁹²

Leadership Development

Although Howard Manor has no staff, the local chapter encourages members to attend workshops on preservation.⁹³

Program Development

No programming currently exists; however, the Chapter's target community would be residents of the Central Savannah River Area.⁹⁴ The Chapter's 990 Form showed they spent \$13,398.00 on programming, which could have been used for preservation of the Howard Manor, but there is not a breakdown listed.⁹⁵

Community Engagement

Part of the master plan is to engage the community to help preserve the property.⁹⁶

⁹² Dr. Hannah Fowler Interview by R. Katherine Croft, April 24, 2021.

⁹³ Dr. Hannah Fowler Interview

⁹⁴ Ibid

⁹⁵ United States Department of the Treasury, 2002 (Form 990), John Franklin Wren Chapter, NSDAR (2002)

⁹⁶ Howard Manor Master Plan, 6

Revenue Development

Howard Manor receives funding from member dues and individual donations. The Chapter has applied for grants but has been unsuccessful.⁹⁷

Historic Preservation Challenges & Planning

In its master plan, the John Franklin Wren Chapter acknowledges that Howard Manor's condition is not as sound as it could be. In 2011, a fire broke out in the dining room that caused extensive smoke damage throughout the house. The Chapter was able to collect insurance money and restore the house. However, little funding was left for structural maintenance after paying bills for electricity, gas, water, and insurance. The outside stairs—the only way to access the second story—collapsed two years ago and have not been repaired. Thus, no one has accessed the second story since 2019. It has also been years since the house was inspected for termites, decay, mold, or water leaks.⁹⁸



Figure 9. Howard Manor, 2021 (taken by author)

⁹⁷ Ibid, 6

⁹⁸ Ibid, 5

Dr. Fowler has contacted GSSDAR for help with where to start, but no state officers or state chairmen have responded. She has also reached out to the community to form a partnership to clean the property and look for grants. She is seeking assistance with structural maintenance as well.

Summary

Despite the many preservation challenges facing the John Franklin Wren Chapter regarding Howard Manor, the Chapter appears to be headed in a better direction with the current regent. The organization created a master plan despite being unsure of where to start. Since initial contact, the author has been able to aid in the nonprofit's preservation efforts by answering questions, including those about the National Register of Historic Places. This property is in dire need of a comprehensive assessment. I am nevertheless confident that, with the right tools, the Chapter will be able to rehabilitate the building into a local history museum and rental facility.

Unfortunately, after speaking with Dr. Fowler, it became even clearer that chapters rarely receive guidance from GSSDAR leadership. I recognize that GSSDAR is a volunteer organization; however, at least one of the three people Dr. Fowler contacted should have responded, even if only to direct her to the State Historic Preservation Office or another organization such as the Georgia Trust.

Case Study Site #3

The Hay House, Macon, Georgia

Historic Site Brief History

Owned and operated by the Georgia Trust, the Hay House was originally home of the Johnston family from 1860 to 1896. Located in Macon, Georgia, the full name of the house is the Johnston–Felton–Hay House, even though only two families lived at the house over three generations. Its name is often shortened to the Hay House. The property was declared a National Historic Landmark in 1974.

William Butler Johnston and his wife were considered imaginative owners for their time. The Johnstons were inspired by the Italian architecture they observed while visiting hundreds of museums, historic sites, and art studios. Upon their return to America, they constructed a monumental Italian Renaissance Revival mansion in Macon.⁹⁹ Construction on the house began in 1855 and continued until 1859. The mansion was completed with four stories and a two-story octagonal cupola on top. Impressively, “when constructed, the now historic house had hot and cold running water, central heat, gas lighting, a speaker-tube system, in-house kitchen, and an elaborate ventilation system.”¹⁰⁰ The family had also collected fine porcelains, sculptures, and paintings as mementos of their grand tour of Europe.

⁹⁹ “Historic House,” The Hay House

¹⁰⁰ “Historic House,” The Hay House. Last modified 2022, Accessed February 21, 2022, <https://www.hayhousemacon.org/history/historic-home/>



Figure 10. The Hay House exterior, 1910 (The Hay House, <https://www.hayhousemacon.org/wp-content/uploads/2013/06/1895-exterior.jpg>)

The family's youngest daughter, Mary Ellen, was married to William H. Felton in 1888, and they became the primary owners of the house. They remodeled parts of the home, including updating the plumbing and adding electricity. In 1926, the Felton heirs sold the house to Parks Lee Hay, founder of the Banker's Health & Life Insurance Company. The Hay family substantially redecorated the house to 20th-century living, such as by adding a driveway and brick gateposts. The family also redesigned and replanted the grounds to add a lower garden and fishpond. Originally the Johnston estate was composed of 3.8 acres; the ginkgo trees, magnolias, and cedars that date to the 19th century are among the few surviving early plantings by the Johnston family.¹⁰¹

¹⁰¹ Ibid

After Mrs. Hay's death in 1962, her heirs operated the house as a private house museum and established the P. L. Hay Foundation. However, in 1977, ownership of the house was transferred to the Georgia Trust which has operated the site ever since. Most of the museum's furnishings date from the Hay family's occupancy with a few pieces from the Johnston family. The most notable of the Johnston family's possessions is the Eastlake-style dining room suite. Additionally, "the most important piece in the collection may be the 1857 marble statue, 'Ruth Gleaning,' by American expatriate sculptor Randolph Rogers."¹⁰² Because the Hay House is constantly undergoing research and restoration, the site is associated with public outreach with respect to educating the public about historic preservation processes.



Figure 11. The Hay House exterior, 2018 (The Hay House, <https://www.hayhousemacon.org/wp-content/uploads/2014/03/house-front-1161x450.jpg>)

¹⁰² Ibid

Nonprofit Owner Brief History

The Georgia Trust was founded in 1973 as a nonprofit for the preservation and revitalization of Georgia's diverse historic resources. The organization also advocates for these resources' appreciation, protection, and use. Coinciding with the Women's Preservation Movement, the nonprofit's first president was Mary Gregory Jewett, an American preservationist, journalist, public official, and historian.¹⁰³

As a statewide, nonprofit preservation organization, the Georgia Trust accomplishes its mission of generating community revitalization by finding buyers for endangered properties acquired under its Revolving Fund. This task is completed by raising awareness of endangered historic resources through an annual listing of Georgia's "Places in Peril."¹⁰⁴ The organization also provides preservation resources for individuals and communities throughout the state and advocates for preservation funding and laws through the following programs: Georgia Trust GREEN, African American Preservation Program, Places in Peril, Revolving Fund, Easements, West, Atlanta Preservation Initiative, Historic Preservation Institute, Preservation Awards, EarthCraft, Sustainable Preservation, and Advocacy.¹⁰⁵

The Georgia Trust recognizes preservation projects and individuals with its annual Preservation Awards. Students and professionals can be awarded the Neel Reid Prize and Liz Lyon Fellowship. The organization also gives out the "Mary Gregory Jewett Award for distinguished service in the field of preservation[, which] is named for the Trust's first executive director and is the Trust's top honor given to an individual.

¹⁰³ "About," The Georgia Trust for Historic Preservation, Last modified 2022, Accessed January 25, 2022, <https://www.georgiatrust.org/about/>

¹⁰⁴ "About," The Georgia Trust for Historic Preservation

¹⁰⁵ Ibid

This award is reserved to recognize those whose dedication and service to the field of historic preservation in the state of Georgia is extraordinary.”¹⁰⁶ The Georgia Trust also offers a variety of educational programs for adults and children; provides technical assistance to property owners and historic communities; advocates for funding, tax incentives, and other laws aiding preservation efforts; and manages two house museums in Rhodes Hall in Atlanta, Georgia and the Hay House in Macon, Georgia.¹⁰⁷

Nonprofit Business Structure

Even though the Georgia Trust owns the Hay House, the site maintains a set of staff separate from the parent organization. The Hay House can thus establish programs pertinent to its community: tourists in Macon, the city itself, and the rest of the state of Georgia.¹⁰⁸

Hay House staff includes a Director, a Manager of Collections and Education, and an Operations Manager. Current Director Ennis Willis does not have an educational background in preservation but is trained in law and management. Director Willis served on the Board of Trustees for the Hay House prior to being the director. He therefore possesses a background of the historic property.¹⁰⁹

Director Willis described his duties as “keeping the house safe and keeping it properly maintained.” He provides a report to the local Board of Trustees and to the Georgia Trust’s Board of Trustees. The Director of the Hay House also answers to the

¹⁰⁶ Ibid

¹⁰⁷ Ibid

¹⁰⁸ Ennis Willis Interview by R. Katherine Croft, Augusta, Georgia, March 11, 2022

¹⁰⁹ Ennis Willis Interview

CEO of the Georgia Trust, Mark C. McDonald, because both entities are owned by the same parent organization.¹¹⁰

The Hay House has volunteers who docent for the house, give tours, and work at events. They are not paid but are educated in the historical aspects of the house as well as the history of the family. They report to the director and are used as needed.¹¹¹

The Hay House has a set of bylaws. Although they are not publicly accessible, a copy can obtained upon request. The site's strategic plan is also not available to the public, but a revision is being drafted. The updated strategic plan will contain an outline for newer programming and revenue development.¹¹²

Organization's Form 990

The Georgia Trust's Form 990 lists the organization's status as 501(c)(3). The form lists the officers and chairs of the Board along with the main director of the organization. The director of the Hay House is not listed, perhaps because he is solely involved with the Hay House and not the Georgia Trust. The form lists the nonprofit's number of employees as 35, which should account for the house director as well as the small set of property staff.¹¹³

The Georgia Trust also lists the Hay House as an accomplishment of preservation/restoration in its Statement of Program Service Accomplishments. Programming includes oversight of all properties, exhibitions, and lecture halls; and

¹¹⁰ Ibid

¹¹¹ Ibid

¹¹² Ibid

¹¹³ United States Department of the Treasury, Internal Revenue Service, 2019 (Form 990) Georgia Trust for Historic Preservation (Washington, DC, 2019)

heritage education, including the Talking Walls program which prepares local teachers to teach students about the area's historic value.¹¹⁴

Capacity Building

Organizational Development

The Georgia Trust's mission "is to work for the preservation and revitalization of Georgia's diverse historic resources and advocate their appreciation, protection and use." Within this mission is the reason for the organization's stewardship of the Hay House. The Georgia Trust also ensures that the Hay House director adheres to all legal compliance, policies, and procedures and that the house has proper funding and planning. The parent organization's job is to ensure that the site is succeeding.

The Hay House's mission is being reworked but echoes the Georgia Trust in that it is "for the preservation and revitalization of The Johnston-Felton-Hay House as a historic resource and advocate for its appreciation, protection and use."¹¹⁵ The Georgia Trust also works with the director to make sure the nonprofit has current information technology, to help with human resources, and to oversee the site's financial management. These activities are carried out through board meetings where the directors of each organization discuss goals and plans for the organization and historic property.¹¹⁶

¹¹⁴ United States Department of the Treasury, 2019 (Form 990) Georgia Trust for Historic Preservation (2019)

¹¹⁵ Ibid

¹¹⁶ Ibid

Leadership Development

Even with a small staff, the Hay House budgets for leadership development and actively encourages staff to take advantage of career development opportunities offered by the Georgia Trust. The Hay House also recruits volunteers; Director Willis believes the current staff to be the best he has ever had.¹¹⁷ Five volunteer docents work tours and events for the property.¹¹⁸

Program Development

The Hay House Manager of Collections and Education works with the site's director to create effective educational programming. They jointly develop all new programs, for schoolchildren to older adults, that are part of the new strategic plan to be rolled out in the next fiscal year.¹¹⁹ In 2019, the Georgia Trust spent \$1,395,714.00 in total for all their programming, not just at Hay House. There is not a separate sheet to see how much went to Hay House's programming.

The Georgia Trust assesses client satisfaction through surveys. Its programs are expanded and improved based on partnerships throughout the state. Once programming is developed, the organization monitors its audience reach and whether it covers the target community.¹²⁰

¹¹⁷ Ibid

¹¹⁸ Ibid

¹¹⁹ Ibid

¹²⁰ Ibid

Community Engagement

Community engagement is facilitated by the Hay House director and the Manager of Collections and Education as well as the Georgia Trust. Community support plays a large part in the site's funding. Educational outreach has been developed in collaboration with the local Bibb County School System. The aim is to inspire students to interpret the historical and cultural significance of their community by cultivating skills in observation, analysis, and evaluation. The Hay House offers age-specific school tours to complement the Georgia Performance Standards instituted in state classrooms.¹²¹

The Georgia Trust is a major partner enhancer; the organization reaches out to the local commission and other preservation organizations on the Hay House's behalf. The Hay House considers its community to be the local Macon community as well as the rest of the state of Georgia. This nonprofit works locally with other nonprofits in Macon to address its audience.

Revenue Development

The Hay House has a yearly budget that the director presents to the Board of Trustees. The budget contains a list of revenue sources separated by revenue type. The Hay House receives funding through diverse sources: an endowment; patron memberships; special events; fundraisers; the Spring Stroll of Gardens Annual Event; and house rentals for events such as film shoots, photoshoots, and weddings. They also receive funding from visitors and tours. Grants are another funding source but are not guaranteed; they can be added to a budget for a program or preservation effort if

¹²¹ Ibid

awarded. The house is not in revenue peril and is financially stable, partly because the Georgia Trust assists with funding and donor participation.

Historic Site Preservation & Challenges

Preservation challenges involving the Hay House can vary depending on the preservation efforts and discovery. The Georgia Trust owns two properties in Georgia: Rhodes Hall in Atlanta and the Hay House in Macon. Resources are often split between the two. Therefore, having a nonprofit dedicated to the Hay House is paramount to ensuring that preservation efforts are efficient and timely. The organization can generate its own funding for preservation and programming.¹²²

The Hay House also has its own preservation plan, which is vital to preservation. This plan outlines how the house has been preserved by the Georgia Trust and serves as a renovation guide. Additions to the original plan can be undertaken as funding becomes available and as a preservation project's completion is deemed fundamental to the property's preservation. The Georgia Trust also makes sure that SOI Standards are being followed. Additionally, when a consultant or firm is hired for the Hay House, both the Director and the CEO of the Georgia Trust make sure the Standards are fulfilled.¹²³

Director Willis shared that the greatest challenge is managing house maintenance while improving the property during restoration. Maintenance and proper restoration are costly. Both are achieved through the organization's budget and revenue development planning.¹²⁴

¹²² Ibid

¹²³ Ibid

¹²⁴ Ibid

Summary

Even with a small number of staff, the Hay House can complete its mission and develop programming that suits the target community. The property's management and leadership development are on par with best practices in nonprofit management. Preservation efforts align with SOI Standards, and partnerships within the preservation community keep the Hay House engaged in this regard. The Hay House now receives assistance from its parent organization to accomplish its mission. Yet even if circumstances change at the Georgia Trust, or if the property were to be sold to the Hay House nonprofit, the organization's efficient capacity building would enable it to stand on its own based on programming and revenue development.

Case Study Site #4

The Boyhood Home of President Woodrow Wilson, Augusta, Georgia

Historic Site Brief History

Today, the Boyhood Home of President Woodrow Wilson serves as a house museum depicting the life of the 28th President as a boy growing up in Georgia during the Civil War and Reconstruction. The house was initially a Presbyterian manse.¹²⁵ Now, as

¹²⁵ "About Boyhood Home," Historic Augusta, Inc., Last modified 2017, Accessed January 29, 2022, <https://www.wilsonboyhoodhome.org/learn/about-boyhood-home/>

the oldest presidential residence in the state, it serves as an educational facility and a historic attraction for the City of Augusta.¹²⁶

Local stove merchant, Aaron H. Jones, built the house in 1859 but never occupied it. He sold it in February of 1860 to the Trustees of the First Presbyterian Church. Because the house was across Telfair Street from the church, the property was conveniently located. Rev. Dr. Joseph Ruggles Wilson, the father of Thomas Woodrow Wilson, was the church minister. The Wilson family moved into their new home from the former manse on Greene Street; 53 McIntosh Street, later known as 419 Seventh Street, would remain the official residence of the pastor of First Presbyterian Church for the next seventy years.¹²⁷



Figure 12. Woodrow Wilson Boyhood Home in the 1860s, 2000s (Painted by Oseha for Historic Augusta, https://historicaugusta.square.site/uploads/b/13a42300-72c7-11ea-8eb8-2369387cedb4/76693365_1197317270477498_6784492819374407680_o.jpg?width=1200)

¹²⁶ “About Boyhood Home,” Historic Augusta, Inc.

¹²⁷ Ibid

The Wilsons lived in the house for nearly eleven years, witnessing the Civil War and Reconstruction. In 1870, the Southern Presbyterian Church called Rev. Dr. Wilson to a different position at its seminary in Columbia, South Carolina. The family moved from the house while the Presbyterian manse remained under ownership of the Trustees of the First Presbyterian Church, Augusta from 1860–1930. The families of reverends stayed in the manse until it was sold in 1930 to William Cincinnatus Peebles and May Booth Peebles. In 1975, Thomas C. Rosier and Willie I. Moore owned the house which was at some point converted into a beauty parlor, a florist shop, and a private residence. On March 23, 1991, Historic Augusta, Inc. purchased the former Presbyterian manse at public auction for \$200,000 and began restoration efforts that lasted more than a decade.¹²⁸



Figure 13. Woodrow Wilson Boyhood Home, 1975 (taken by Historic Augusta, National Register of Historic Places Gallery <https://npgallery.nps.gov/NRHP/AssetDetail/54281664-89c9-455b-9697-8b562267b123>)

¹²⁸ Ibid

Historic Augusta, Inc. enlisted the help of Norman D. Askins of Atlanta as the project architect in 1992. They completed a study to identify architectural changes that had occurred at the house. The architectural team also brought in David C. Crass, Ph.D., for an archaeological investigation and Erick D. Montgomery, who had conducted extensive historical research. Their findings were combined in a report published in February 1994. Following those recommendations and advice from other presidential site managers, Historic Augusta, Inc. purchased the Joseph R. Lamar Boyhood Home next door. This house was and still is used as an interpretive space and support facilities for the presidential site. After years of planning and restoration, Historic Augusta, Inc. finally opened the Boyhood Home of President Woodrow Wilson for tours as a house museum in 2001.¹²⁹



Figure 14. Woodrow Wilson Boyhood Home, 2017 (Historic Augusta, <https://www.wilsonboyhoodhome.org/>)

¹²⁹ Ibid

Nonprofit Owner Brief History

Historic Augusta, Inc. was chartered in 1965 as a nonprofit membership organization dedicated to preservation of the historic built environment in Augusta and Richmond County, Georgia. The mission of Historic Augusta, Inc. is “to preserve historically or architecturally significant sites in Augusta and Richmond County, Georgia.”¹³⁰

The organization realizes its mission by identifying major historic resources in the Augusta community, educating the public about their importance, and assisting others in preserving historic properties in the area. Historic Augusta, Inc. works with the local, state, and federal government to protect the city’s historic buildings, sites, and districts. It also assists in the sale of historic buildings and has, in certain instances, accepted the title of endangered historic properties until a plan for their preservation can be secured.¹³¹

Historic Augusta, Inc. currently owns two historic properties: the historic Joseph R. Lamar Boyhood Home at 415 Seventh Street; and the next-door property, the Boyhood Home of President Woodrow Wilson at 419 Seventh Street. The Lamar House is the organization’s headquarters, while the Boyhood Home of President Woodrow Wilson is a house museum.¹³²

¹³⁰ “About Us,” Historic Augusta, Inc., Last modified 2022 Accessed January 29, 2022, <https://www.historicaugusta.org/about-us/>

¹³¹ “About Us,” Historic Augusta, Inc.

¹³² Ibid

Nonprofit Business Structure

The Boyhood Home of President Woodrow Wilson is owned by Historic Augusta, Inc., which owns two properties in the city as noted: the Lamar House and the Boyhood Home of President Woodrow Wilson. The properties are next to each other, enabling the organization to be housed at the Lamar House separate from the presidential museum. The nonprofit has a small paid staff who help with the house museum to fulfill the organization's mission.¹³³ Staff members include the Executive Director, Preservation Assistant, Programs & Marketing Director, Administrative Assistant, and two docents who are paid tour guides. Erick Montgomery is the current Executive Director of Historic Augusta, Inc.¹³⁴ The main staff position at the Boyhood Home of President Woodrow Wilson is not filled at the museum; the director reports to the Museum Committee of Historic Augusta, Inc. He serves as a liaison to Historic Augusta, Inc. regarding the museum, programming, community engagement, and preservation needs.¹³⁵

The organization has a set of bylaws and a board of directors who work with the nonprofit to meet its goals. The Executive Director reports to the Board about the museum and other organizational business. There is also a board of trustees to offer expert preservation counsel and to ensure that SOI Standards are followed when preservation work is done on the properties.

¹³³ Ibid

¹³⁴ Ibid

¹³⁵ Ibid

Organization's Form 990

Historic Augusta, Inc.'s Form 990 lists the organization's status as 501(c)(3). Erick Montgomery is listed as the Executive Director. The form also indicates the chair of the board, board members, and trustees of the organization. The reported number of employees is eight.¹³⁶

Regarding programming, Historic Augusta, Inc.'s Statement of Program Service Accomplishments lists tours and special activities to raise awareness and educate members and the public about Augusta's history. The nonprofit is also assembling a book detailing historical items of note in the city for the Augusta Book Project. The organization further indicates its assistance to the Union Baptist Church, a historical structure in downtown Augusta that is also requiring repairs and maintenance.¹³⁷

Capacity Building

Organizational Development

Historic Augusta, Inc.'s mission is "... to preserve historically or architecturally significant sites in Augusta and Richmond County, Georgia." The organization has a separate mission for the Boyhood Home of President Woodrow Wilson that is being reworked. Historic Augusta, Inc. seeks to make sure that the museum is abiding by all legal compliance, policies, and procedures.

¹³⁶ United States Department of the Treasury, Internal Revenue Service, 2019 (Form 990) Historic Augusta, Inc., (Washington, DC, 2019)

¹³⁷ United States Department of the Treasury 2019 (Form 990) Historic Augusta, Inc., (2019)

The Executive Director reports to the Board of Directors about necessary funding and program planning.¹³⁸ Also, as the Museum Director position is currently unfilled, the Executive Director must ensure that goals and plans for the organization and historic property are met and reflect the nonprofit's mission.¹³⁹

Leadership Development

Historic Augusta, Inc. has a planned but limited budget for internal staff career development. As a small staff, and due to a lack of museum staff, the budget is not an issue so much as taking off time. If a staff member takes time to attend training, their position may have to be filled by another staff member temporarily. Planning around these situations has generated limited opportunities.¹⁴⁰

In terms of succession, the organization has a written set of notes along with a strategic plan and a preservation plan. The nonprofit also has volunteer recruitment but can encounter difficulty keeping volunteers engaged if tours are scheduled for the museum. The nonprofit's Board of Trustees and Board of Directors maintain proceeding minutes for succession.¹⁴¹

Program Development

Historic Augusta, Inc.'s Executive Director works with the Board to establish effective programming. Budgeting for programming occurs annually as per the strategic

¹³⁸ Erick Montgomery Interview, by R. Katherine Croft, March 11, 2022

¹³⁹ Erick Montgomery Interview

¹⁴⁰ Ibid

¹⁴¹ Ibid

plan.¹⁴² Historic Augusta, Inc. spent \$242,621.00 in 2019 on their programming.

However, that is for all their programming, and not just the Boyhood Home of Woodrow Wilson.¹⁴³

Similar to Meadow Garden, Historic Augusta, Inc. uses TripAdvisor to reach the community and generate ideas for programming. This platform also enables the organization to gain feedback and information about the nonprofit's audience.¹⁴⁴

Community Engagement

Community engagement involving Historic Augusta, Inc. through the Boyhood Home of President Woodrow Wilson is performed by the Director; Historic Augusta, Inc.'s Programs Manager; and docents. These staff members have created several educational outreach programs to help the community understand the museum's importance.¹⁴⁵

Community support is integral to the organization realizing its mission by engaging the public in historic preservation education. This community comprises the City of Augusta, the state of Georgia, and the country. The museum works through Historic Augusta, Inc. to establish community partnerships with the city, the local historic commission, and the Augusta Museum of History.¹⁴⁶

¹⁴² Ibid

¹⁴³ United States Department of the Treasury 2019 (Form 990) Historic Augusta, Inc., (2019)

¹⁴⁴ Erick Montgomery Interview

¹⁴⁵ Ibid

¹⁴⁶ Ibid

Revenue Development

The Boyhood Home of President Woodrow Wilson is part of the overall budget of Historic Augusta, Inc. A large proportion of the organization's budget is split between the Boyhood Home and the Lamar House. Because the house museum itself not a standalone operation, there are a lot of things that would need to be included in the revenue if it were not an integral part of Historic Augusta, Inc.¹⁴⁷

Revenue sources for Historic Augusta, Inc. include patron memberships, special events, fundraisers, and The Cotton Ball Annual Event. The organization also receives funding from tours and the gift shop. Grants are an additional funding source but are excluded from the annual budget because they are not guaranteed.¹⁴⁸

Historic Site Preservation & Challenges

Revenue sourcing is the greatest difficulty facing the Boyhood Home of President Woodrow Wilson. As Executive Director Montgomery explained, "Historic properties always need something done. Right now, we're spending about \$60,000 on painting. And the question was where are we going to get that money? And I applied for some grants and didn't get them. So we had to take it from other funds."¹⁴⁹ As a property without an endowment, the museum has to create its own sources of revenue. Another preservation site challenge is finding personnel and keeping volunteers engaged. Because Augusta is not a major area for tourism, tour groups are unpredictable, a circumstance that can frustrate docents.

¹⁴⁷ Ibid

¹⁴⁸ Ibid

¹⁴⁹ Ibid

The historic property has its own preservation plan, which serves as a guide for renovation of the museum. Historic Augusta, Inc. makes sure that SOI Standards are being followed in general and when a consultant or firm is hired to work on the Boyhood Home of President Woodrow Wilson. The Executive Director and the Board of Directors ensures the SOI Standards are addressed.¹⁵⁰

Summary

The Boyhood Home of President Woodrow Wilson is not a separate nonprofit from Historic Augusta, Inc., which is not a problem because the organization can realize its mission and develop programming that fits the museum's target community. Management and leadership development comply with best practices in nonprofit management with a mission and bylaws. Preservation efforts on both properties are currently in line with SOI Standards; the nonprofit's preservation standards are therefore excellent. Community partnerships within the preservation community and the historical community keep the museum connected to its target audience.

The Boyhood Home of President Woodrow Wilson receives help from its parent organization and is able to accomplish its mission. However, if the museum were independent, it could encounter obstacles to programming and revenue development. The museum staff is critical to a successful institution; without one, the organization that owns the property would need to assume myriad tasks related to jobs and work performance. The lack of an endowment can also lead to budgeting issues even for a

¹⁵⁰ Ibid

successful nonprofit. Capacity building and strategic planning are therefore central to the site's success.

Case Study Site #5

Harper Fowlkes House, Savannah, Georgia

Historic Site Brief History

The Harper Fowlkes House has had several owners throughout its history. The house was designed by Irish architect, Charles Cluskey. Cluskey was hired by a local shipping magnate in Savannah named Stephen Gardner. The house was styled as a Greek Revival home on prominent Orleans Square, with construction beginning in 1843. Soon after, "... Mr. Gardner had financial problems, so he sold it to his brother John, who then sold it to Aaron Champion in June of 1843 in order to recoup his losses."¹⁵¹ Champion continued with the construction and moved into the house many years later. When he passed in 1881, the property was left to his son-in-law to be held in trust for his daughter and her children: Aaron, James W. Jr., Henry, Mary, and Maria.

After their mother's death, the siblings sold their interest in the house to their brother, Henry. Henry's second wife's father paid off the remaining mortgage and gave the house to Henry and Isabel as a wedding present. Isabel renovated the house in 1895 with an addition to the top floor and Mansard roof. The staircase was moved to the back

¹⁵¹ "History," Harper Fowlkes House, Last modified 2022. Accessed January 20, 2022, <http://www.harperfowlkeshouse.com/history/>.

of the house to enlarge the dining room. Doing so also increased the value of the property.¹⁵²



Figure 15. Harper Fowlkes House, 1940s (Coastal Heritage Society, Frances Benjamin Johnson)

After the death of Henry McAlpin in 1931, a dispute arose concerning the estate, and Alida Harper Fowlkes purchased the property through auction. Interestingly, “An oral history interview stated that it was noted on Alida’s mortgage papers they stamped ‘WOMAN’ across the top.”¹⁵³ Alida, through her antique business, placed antique furniture and family heirlooms throughout the home. Her will directed the property, furniture, and heirlooms to be held in trust to the Society of the Cincinnati in the State of

¹⁵² “History,” Harper Fowlkes House

¹⁵³ Ibid

Georgia. Alida's brother William E. Harper, Jr. and late father William E. Harper were Society members.¹⁵⁴ The McAlpins' descendants are also members of the Society of the Cincinnati, and they are honored by the present museum collection that exhibits their time in the house.¹⁵⁵



Figure 16. Harper Fowlkes House exterior front, 2000s (The Society of the Cincinnati in the State of Georgia, <http://www.harperfowlkeshouse.com/wp-content/uploads/Harper-Fowlkes-House.jpg>)

Nonprofit Owner Brief History

The Society of the Cincinnati in the State of Georgia was organized in Savannah on August 13, 1783, by officers of the Georgia Continental Line. The descendants of these officers constitute the present membership. The Society's mission is to promote knowledge of the American Revolution and to foster fellowship among its members.¹⁵⁶

The Society of the Cincinnati is the nation's oldest patriotic organization, founded by the officers of the Continental Army and their French counterparts who served

¹⁵⁴ Ibid

¹⁵⁵ Ibid

¹⁵⁶ "Welcome," The Society of the Cincinnati in the State of Georgia, 2022 Accessed March 19, 2022, <https://gasocietyofthecincinnati.org/>

together in the American Revolution. The first President of the Society was George Washington. The main organization now has over 4,000 members. There are thirteen state societies, one for each of the thirteen original states, and a French Society.¹⁵⁷

Membership in the lineage society is granted through a single male descendant of a commissioned officer of the Continental Army. These members belong to the state society of the state that issued their Revolutionary War ancestors' commission, with the Georgia Society's state being Georgia. The Georgia Society was the seventh constituent society to organize and currently has 115 members.¹⁵⁸

The Georgia Society meets annually in Savannah at its historic property, the Harper Fowlkes House. Here, the committees of the Georgia Society report their respective responsibilities, including the committee for the property. The Georgia Society's fall meetings and annual meetings are usually held at the Harper Fowlkes House. Because the Society also became known as the "One Society of Friends," the Georgia Society strives to maintain a sense of brotherly affection among its members by encouraging active participation in meetings and functions. The same cohesion is encouraged through the work of the Georgia Society, the Society's State Association, and the General Society.¹⁵⁹

¹⁵⁷ "History of the Society," The Society of the Cincinnati in the State of Georgia, 2022, Accessed March 19, 2022. <https://gasocietyofthecincinnati.org/history-of-the-society/the-society-of-the-cincinnati-in-the-state-of-georgia/>

¹⁵⁸ "History of the Society"

¹⁵⁹ Ibid

Nonprofit Business Structure

The Society of the Cincinnati in the State of Georgia works with the Coastal Heritage Society (CHS) to manage the Harper Fowlkes House. The CHS's mission is to provide educational experiences for the public through the preservation and presentation of historic resources in coastal Georgia and adjacent regions. The CHS employs two staff at the Harper Fowlkes House: the director and a head docent.¹⁶⁰

The Society of the Cincinnati in the State of Georgia has a house trustee group and a house committee that oversees house payments and maintenance. The director reports to the Trustees of the Harper Fowlkes House. They work with the existing endowment or fundraise within the Society. While the Society of the Cincinnati in the State of Georgia has a set of bylaws, this information is not publicly accessible.

Organization's Form 990

The Form 990 filed by the Society of the Cincinnati in the State of Georgia lists the organization's status as 501(c)(3). The Society's committee members are listed but other employees are not¹⁶¹ due to their relationship with the CHS. The CHS's Form 990 lists the Board of Trustees along with the CEO, Sandra Baxter. The form indicates the organization's current number of employees as 111, including Director of the Harper Fowlkes House, Betty Youles.¹⁶²

¹⁶⁰ Betty Youles Interview by R. Katherine Croft, March 16, 2022.

¹⁶¹ United States Department of the Treasury, Internal Revenue Service, 2020 (Form 990), The Society of the Cincinnati in the State of Georgia (Washington, DC, 2020)

¹⁶² United States Department of the Treasury, Internal Revenue Service, 2019 (Form 990), The Coastal Heritage Society, Inc., (Washington, DC, 2019)

Under the Statement of Program Service Accomplishments, the Society of the Cincinnati lists education concerning the American Revolution. Activities include commemorations of this event and other actions to preserve the heritage, historic preservation, renovation, and conservation of historically significant properties in the state of Georgia.¹⁶³

The CHS lists on its Form 990 such accomplishments as programs for daytime visitors, site improvements at historic landmarks, publications, and special evening programs. The form also states that the Society is organized to increase public awareness of the historical aspects of the surrounding area, accomplished by operating restored historical sites that provide programs, exhibits, and publications for visitors. The Harper Fowlkes House is included in this category because the CHS employs the site's director.¹⁶⁴

Capacity Building

Organizational Development

The mission of the Society of the Cincinnati in the State of Georgia is to promote knowledge of the American Revolution and to foster fellowship among the organization's members. The Society uses the Harper Fowlkes House as a meeting location to achieve its mission. The house is also used every year for the annual Georgia meeting.¹⁶⁵ Because the CHS's mission is to provide educational experiences for the public by preserving and

¹⁶³ United States Department of the Treasury, 2020 (Form 990), The Society of the Cincinnati in the State of Georgia (2020)

¹⁶⁴ United States Department of the Treasury, 2019 (Form 990), The Coastal Heritage Society, Inc., (2019)

¹⁶⁵ Betty Youles Interview

presenting historic resources across coastal Georgia, the nonprofit's partnership with the Harper Fowlkes House is achieved by offering educational programming and staffing the property. The CHS also helps to ensure that the museum is adhering to all legal compliance, policies, and procedures.

Leadership Development

The CHS's small staff can capitalize on leadership opportunities presented by the organization.¹⁶⁶ The Society of the Cincinnati in the State of Georgia does not provide these opportunities for staff. It is unknown whether the house trustee group or house committee group are provided with opportunities.¹⁶⁷

Program Development

The CHS works with the director to make sure the organization is creating effective educational programming as part of its mission to promote the Harper Fowlkes House. Even though the society listed they spent \$59,895.00 in 2019 on programming, without a breakdown it is unknown if any goes to the programming that the CHS completes for them.¹⁶⁸ Currently, the CHS develops all programs for the Society of the Cincinnati in the State of Georgia regarding the Harper Fowlkes House. Client satisfaction is thus evaluated via the CHS, as are program expansion and improvement. As the partnership continues, CHS will help ensure that the target audience is met for the Society.¹⁶⁹

¹⁶⁶ Ibid

¹⁶⁷ Ibid

¹⁶⁸ United States Department of the Treasury, 2019 (Form 990), The Coastal Heritage Society, Inc., (2019)

¹⁶⁹ Betty Youles Interview

Community Engagement

Harper Fowlkes House community engagement is performed by the director and CHS. Community support is a key means of funding for the five museums the organization owns and operates: Savannah History Museum, Savannah Children’s Museum, Georgia State Railroad Museum, Old Fort Jackson, and Pin Point Heritage Museum. Educational outreach has been established by collaborating with local museums to create a community of coastal heritage. The CHS is a major partner for the Society by reaching out to local schools and educational groups on the historic property’s behalf.

Revenue Development

The Society of the Cincinnati in the State of Georgia has a house endowment from Alida Harper. If the principal cannot be used for funding, then funds are raised within the Society. Although the Society of the Cincinnati in the State of Georgia has a set of bylaws, this information is not published publicly. Funding sources are accordingly difficult to locate.¹⁷⁰

Historic Site Preservation & Challenges

Preservation challenges related to the Harper Fowlkes House mostly surround planning for preservation around tours and Society meetings. The house is not on the National Register, nor has it been nominated for inclusion. The house is preserved “as is,” and is an exemplar of its architectural style.¹⁷¹ The historic property has a

¹⁷⁰ Ibid

¹⁷¹ Ibid

preservation plan, but the SOI Standards are not always used. The house is not a full museum because it is used as a meeting house; as such, the house is lived in by the Society.¹⁷²

Summary

The Harper Fowlkes House can complete its mission and develop programming that suits the target community with the help of the Coastal Heritage Society. If not for the partnership with the CHS, the mission of the Society of the Cincinnati would only be partially fulfilled by the house meeting the social aspects of the organization's mission.

The Harper Fowlkes House obtains help from its organization through funding. However, if something were to happen to the CHS, the Society's mission would go unfulfilled and the property might become a private residence. Conversely, if something were to happen to the Society, the CHS could potentially take over the property and create a museum environment within the Harper Fowlkes House. Therefore, the house is not in peril and is currently preserved.

¹⁷² Ibid

Case Study Site #6

Andrew Low House, Savannah, Georgia

Historic Site Brief History

The Andrew Low House, named after its initial owner, Andrew Low II, was erected around 1848. The house is now a museum and is owned by The National Society of the Colonial Dames of America in the State of Georgia (NSCDA-GA). It also serves as the headquarters of the Georgia Society. The house has been restored to reflect the 1850s and grant visitors a glimpse of that period in Savannah.¹⁷³

Andrew Low was a wealthy cotton merchant from Liverpool, England who came to Savannah and built the mansion. The building was designed by John Norris of New York, an architect. Low came to the country as a Scottish immigrant at the age of seventeen. The house was home to Low's family. Built in the Greek Revival style, it is a two-story house made up of brick with a stucco structure over a raised basement. Cast iron railings enclose the front and side balconies. The piazzas have a West Indian plantation influence and overlook a brick-walled garden at the rear of the house.¹⁷⁴

Low's son, William Mackay Low, married Juliette Gordon in 1886, at which point the house became theirs. When William Low died in 1905, the house became Juliette Low's. She lived there during the early formation of what became the Girl Scouts of the

¹⁷³ Stuart K. Johnson, "Juliette Gordon, Historic District," National Register of Historic Places Nomination Form, Washington, DC: U.S. Department of the Interior, National Park Service, (1987) Section 8.

¹⁷⁴ Stuart K. Johnson, "Juliette Gordon, Historic District"

USA. On March 12, 1912, Mrs. Low held the first Girl Scout meeting in the United States in the house.¹⁷⁵

As part of the Women's Preservation Movement, the NSCDA-GA purchased the property in 1928, a year after Mrs. Low's death. Specifically, the house was purchased from Juliette Gordon Low's family for \$37,500. Between 1929 and 1937, the basement was turned into a restaurant called Colonial Kitchens, and the upstairs rooms were sometimes rented to help with income to pay for the purchase of the house as well as maintenance.¹⁷⁶



Figure 17. Andrew Low House, south elevation, 2005 (Photo by Marti Gerdes & Robert Blythe. National Register of Historic Places Nomination Form. Washington, DC: U.S. Department of the Interior, National Park Service)

¹⁷⁵ Ibid

¹⁷⁶ Ibid

The Georgia Society opened the home to the public for limited tours in 1952, and by 1966, the Andrew Low House was open to the public. The home was listed on the National Register of Historic Places at the national level of significance as a contributing historic property in the Savannah National Historic Landmark District in 1966; it was listed as part of the Juliette Gordon Low Historic District in 1987. In the early 2000s, the museum received a grant from the prestigious Save America's Treasures program, a joint initiative by the National Park Service, the Institute of Library and Museum Services, and the National Endowment for the Humanities. Grants from this program are awarded to properties that have demonstrated national historical significance. In late 2018, the Georgia Society purchased an 1888 historic structure on the corner of Abercorn and Harris Street, 319 Abercorn Street. The home is now known as Abercorn House and has become the NSCDA-GA's new headquarters.



Figure 18. Andrew Low House front exterior, 2018 (The Andrew Low House, <https://www.andrewlowhouse.com/wp-content/uploads/2021/03/hero-home.jpg>)

Nonprofit Owner Brief History

The NSCDA-GA was formed in 1893 as the twelfth corporate society to become a member of the NSCDA. NSCDA is a national nonprofit organization devoted to “furthering an appreciation of our national heritage through historic preservation, patriotic service, and educational projects.”¹⁷⁷ Membership in the organization is by sponsorship only; members must be women with lineal descendants of an ancestor who rendered significant service to the country during the Colonial period before July 5, 1776. This heritage society is one of several focused on service to the country by a patriotic ancestor.¹⁷⁸

The NSCDA-GA is presently headquartered in Savannah, Georgia at a property recently purchased by the organization. Prior to this purchase, the NSCDA-GA used the Andrew Low House Museum in Savannah as its main headquarters. The organization has more than 1,600 members, with the national organization having forty-four corporate societies and over 15,000 members.¹⁷⁹

Nonprofit Business Structure

The Andrew Low House Museum is governed by the NSCDA-GA. As a separate nonprofit from the NSCDA-GA, the museum’s mission is “to support and preserve the Andrew Low House c.1847, its collections and gardens.” The NSCDA-GA relocated to another building off Abercorn Street and no longer uses the Andrew Low House as its headquarters; this way, the museum can be the full focus of the historic building.

¹⁷⁷ “About Us,” The National Society of The Colonial Dames of America in the State of Georgia, Last modified 2010, Accessed January 29, 2022, <https://nscdaga.org/about-us/>

¹⁷⁸ “About Us,” The National Society of The Colonial Dames of America in the State of Georgia

¹⁷⁹ Ibid

The museum has a paid nine-person staff consisting of the Executive Director, Education & Programs Manager, Bookkeeper, NSCDA-GA Executive Administrative Assistant, Collections Registrar, Marketing & Sales Manager, Sales Associate, and two facilities maintenance workers. Trained docents are often volunteers from the NSCDA-GA. The Executive Director, Rebecca G. Eddins, has a professional museum background and worked in other organizations prior to joining the Andrew Low House. The organization does not have plans to add staff.¹⁸⁰

The governance structure is through the NSCDA-GA: the organization has a board of governors, including a Properties Committee. This committee is essentially the museum's governing board; the Executive Director reports to the Committee for overall governance, similar to a board of trustees.¹⁸¹

Organization's Form 990

The NSCDA-GA is listed on its Form 990 as a 501(c)(3) organization. The form lists the nonprofit's officers as well as the Director of the Andrew Low House. The current number of employees is listed as 25.¹⁸² In its Statement of Program Service Accomplishments, the NSCDA-GA lists the preservation and maintenance of the Andrew Low House along with the promotion of and education about United States history to members and the community at large through student essay contests and scholarships.¹⁸³

¹⁸⁰ Rebecca G. Eddins Interview by R. Katherine Croft, March 20, 2022.

¹⁸¹ Rebecca G. Eddins Interview

¹⁸² United States Department of the Treasury, Internal Revenue Service, 2020 (Form 990), The National Society of the Colonial Dames in the State of Georgia, (Washington, DC, 2020)

¹⁸³ United States Department of the Treasury, 2020 (Form 990), The National Society of the Colonial Dames in the State of Georgia (2020)

Capacity Building

Organizational Development

The NSCDA-GA is a stewardship of the Andrew Low House because the organization purchased the property to save it due to the house's historical significance. The Properties Committee verifies that the Andrew Low House Executive Director is following all legal compliance, policies, and procedures. As the parent organization, the NSCDA-GA also ensures that the house has proper funding and planning.

The mission of the Andrew Low House and its strategic plan are being updated.¹⁸⁴ This revision will facilitate planning for up-to-date information technology, human resources, and better financial management. These tasks are completed through Board of Governors meetings where Executive Director Eddins reports to discuss future and plans for the nonprofit and its historic property.¹⁸⁵

Leadership Development

The budget has built-in revenue set aside for leadership development, and the NSCDA-GA encourages staff to take advantage of career development opportunities offered by the parent organization. Volunteers are available through the NSCDA-GA and can engage in training.¹⁸⁶

¹⁸⁴ Rebecca G. Eddins Interview

¹⁸⁵ Ibid

¹⁸⁶ Ibid

Program Development

The Director and the Education and Program Manager are tasked with developing programs that enhance the museum's mission. They are now working on community involvement. Surveys are conducted to ensure efficient programming. Funding for the programs comes through the NSCDA-GA, and budgeting is based on revenue sources.¹⁸⁷ In 2020, the NSCDA-GA spent \$525,648.00 on programming across the society and not just for the Andrew Low House.¹⁸⁸

Community Engagement

Community engagement for the Andrew Low House is performed by the director. The current executive director brought this aspect into the organization. The NSCDA-GA had coordinated a degree of community engagement in the past, but efforts in this area were sparse. A new public relations and marketing professional was then hired to assist with outreach.¹⁸⁹

The NSCDA-GA is a major partner: this organization has reached out to the local commission and other preservation organizations on the historic property's behalf. The Historic Savannah Foundation is a main community partner. The Andrew Low House considers its community to be the local community of Savannah, tourists, and the rest of the state of Georgia. The nonprofit thus works locally with other nonprofits in Savannah.

¹⁸⁷ Ibid

¹⁸⁸ United States Department of the Treasury, 2020 (Form 990), The National Society of the Colonial Dames in the State of Georgia (2020)

¹⁸⁹ Rebecca G. Eddins Interview

Revenue Development

The Andrew Low House has a yearly budget that the executive director presents to the local Property Committee. Within that budget is a list of revenue sources separated by revenue type. The Andrew Low House receives funding through sources such as an endowment, patron memberships, special events, fundraisers, and giving from the NSCDA-GA. Funding also comes from visitors and tours. As with the nonprofits profiled earlier, grants are another funding option but are not guaranteed; if they are awarded, they can be added to a budget for a program or preservation effort. The Andrew Low House is not in revenue peril and is financially stable.

Historic Site Preservation & Challenges

The Executive Director of the Andrew Low House classified preservation challenges into two categories. The first is finding the time to orchestrate ongoing capital projects. Given the house's small staff, there are not enough members to cover all work that needs to be done at the site. The other problem is typical of any nonprofit—funding.¹⁹⁰

Funding for preservation projects and determining the right time to shut down in order to complete these projects is a prime issue. Because the NSCDA-GA has two properties, maintenance resources are often split between the two. The Andrew Low House, as its own nonprofit dedicated to the historic property, needs proper funding. This nonprofit can make sure that preservation efforts are efficient and timely by generating funding for preservation and programming.¹⁹¹

¹⁹⁰ Ibid

¹⁹¹ Ibid

The historic property has a preservation plan that outlines how the house has been preserved by the NSCDA-GA. The plan also serves as a guide for future property renovations. Additions to the original plan can be implemented as funding becomes available and as preservation is necessary for the property's operations. The executive director makes sure that SOI Standards are being followed. When a consultant or firm is hired for the Andrew Low House, the Executive Director and the Board of Governors of the NSCDA-GA both ensure adherence to the Standards as well.¹⁹²

Summary

The Andrew Low House can complete its mission and develop programming that fits the target community in Savannah. Management and leadership development are on par with the best practices in nonprofit management. Preservation efforts are in line with SOI Standards, and partnerships within the preservation community keep the Andrew Low House engaged in this respect.

In summary, the Andrew Low House receives help from its parent organization, NSCDA-GA, and is able to accomplish its mission. However, if something were to happen to the NSCDA-GA, or if the property were sold to the Andrew Low House nonprofit, efficient capacity building would allow the museum to persist thanks to its programming and revenue development.

¹⁹² Ibid

Chapter Summary

The case studies reviewed in this chapter met defined criteria, and their stories were revealed through a specific methodology. Each property represents a different local or state level. These cases unveiled similarities and differences in nonprofits' approaches to historic site preservation. Each property is unique in its maintenance and is passionately cared for by the organization that owns it. Organizations' preservation efforts vary because each site is used by its owners in a distinct way. The next chapter compares these sites with regard to best practices in nonprofit management and preservation.

CHAPTER IV

ANALYSIS AND FINDINGS

To fully answer my research questions, “What nonprofit management organizational factors are critical in engaging local/state nonprofit membership organizations to successfully manage historic properties?” and “Are there other preservation-related factors?”, I considered the preceding chapters together. Chapter 2 reviewed best management practices for nonprofits and introduced best practices in historic preservation. Chapter 3 addressed historic properties in Georgia that are owned and maintained by nonprofits, referring to source materials to craft a brief historic development narrative and a history of each organization. Every case study included an overview of the corresponding nonprofit’s business structure (e.g., nonprofit management and historic site preservation management). Findings are analyzed in this chapter to identify custodial challenges in preservation and how these issues might be rectified.

Analysis Method

This chapter compares nonprofit best management practices versus how the featured nonprofits manage their organizations and how each nonprofit approaches historic preservation (e.g., policies, plans, funding, personnel, challenges). Data were organized by main aspects of nonprofits’ practices and capacity building along with key approaches to managing historic properties (see the Appendix entitled “Nonprofit Interviews Questions and Answers Chart”). This exercise indicated the success of each

nonprofit and preservation of its historic site. More effective practices are accordingly proposed for historic preservation nonprofits.

Findings

Site Histories

Each organization has a reasonable comprehension on the historical site's history and value to society. However, history is always changing as new information comes to light. Even though historic preservation is a priority, ongoing research behind these case studies are currently not a top priority with most of the organizations. This leaves the history of the buildings as static. However, Meadow Garden is an exception because the Georgia State Society is in the process of working with Landmark Preservation for more information about their historic site. The John Franklin Wren Chapter is also looking at verifying their historical information, although currently no research is currently started to verify the dates of their house besides their deed provenance.

Nonprofit Business Structure

Meadow Garden currently has only one paid staff member to handle all the historic property's needs, but the nonprofit hires and consults with professional preservation experts as needed. The John Franklin Wren Chapter, NSDAR does not have paid staff to take care of Howard Manor and has no preservation expert. The Hay House has several paid staff and is working with its parent organization to verify preservation efforts. The Boyhood Home of President Woodrow Wilson does not have a full staff; however, Historic Augusta, Inc. and its Board of Directors ensure that the property is

managed appropriately. The CHS works with the Society of the Cincinnati in the State of Georgia to keep the Harper Fowlkes House staffed and available to the community. The Andrew Low House has sufficient staff to ensure the nonprofit is functioning as it should. Capacity building, as nonprofit best practice guidance, varies by organization and is not necessarily conducted by the organization itself. Because each nonprofit takes a different approach to business, capacity building is not always efficient.

GSSDAR is a state society with a State Regent who acts as CEO. The organization has an executive board separate from the State Executive Board to act on matters related to Meadow Garden. The Board is composed of State Executive Board members, and appointments rotate every two years. The Director of Meadow Garden is the only staff member alongside volunteer docents. The organization's mission does not have the historic property as the sole focus; however, a preservation plan is in place for Meadow Garden.

The John Franklin Wren Chapter is a typical chapter whose regent acts as a nonprofit CEO. The Chapter does not have an executive board separate from the Chapter Executive Board to act on matters regarding Howard Manor. This situation may apply because the Chapter has not yet acted on its master plan, when an advisory committee will be established.

The Georgia Trust's nonprofit of the Hay House functions like a usual nonprofit, with a Hay House Board and the reporting director. Staff members are also under the Hay House director. The organization has a strategic plan, a mission statement, and a preservation plan.

Historic Augusta, Inc.'s Boyhood Home of President Woodrow Wilson, despite not being a separate nonprofit, functions as a normal nonprofit with a board of directors and the director reporting to them. Staff members are also under Historic Augusta, Inc.'s Executive Director. The organization has a strategic plan, a mission statement, and a preservation plan for the presidential house museum.

The Harper Fowlkes House is unique from other historic preservation nonprofits in that the organization employs and partners with another nonprofit, the Coastal Heritage Society, to complete its mission. The Society of the Cincinnati in the State of Georgia does not have a preservation plan that the director uses but has a guide to preserve the house as is. The house is frequently used as a meeting spot for the nonprofit. The Coastal Heritage Society thus uses the house to fulfill its mission as a museum when not in use by the Society.

The Andrew Low House nonprofit also functions like a classic nonprofit, with a board of governors and an executive director reporting to them. Staff are under the house's executive director. The organization maintains a strategic plan, a mission statement, and a preservation plan for the house museum.

Regarding GSSDAR and the Society of the Cincinnati in the State of Georgia, the nonprofit board is not a typical case: the board is composed of members of the Society who hold jurisdiction over operations. The board is also the authority for the historic property as long as this authority does not conflict with the Society's bylaws (i.e., the property is not the sole beneficiary but is the nonprofit that owns the property.) This arrangement is atypical of a nonprofit dedicated to a historic property because the executive director receives instructions from the board at meetings to carry out the

organization's mission, which is not necessarily related to historic preservation. The same can be said about the John Franklin Wren Chapter: it does not have a separate board from its Chapter Executive Board when it comes to Howard Manor.

Administration shifts caused by the changes in the board or succession, as well as issues with bylaws, were initially perceived as issues but are not identical across organizations. The GSSDAR's two-year terms elicited concern due to the rapid turnaround for funding and dedication to a preservation plan. Building usage also differed among nonprofits: some used their respective historic sites as museums and did not conduct regular organizational business there, whereas others used the site as a meeting location.

Unlike Historic Augusta, Inc. and the Georgia Trust, the other organizations are hereditary societies. NSCDA-GA is a hereditary society but has a separate nonprofit running its historic property; the nonprofit is thus the sole mission and functions akin to a typical historic preservation nonprofit. Similar to Historic Augusta, Inc. and the Georgia Trust, it also has a strategic plan rather than simply a preservation plan. Table 4 compares key nonprofit business management aspects across the case study sites; Table 5 compares details from these nonprofits' 990 Forms.

Table 4. Comparison of Nonprofit Business Management Practices across case study sites (created by author)

Nonprofit Organization	Organizational Development	Program Development	Revenue Development	Leadership Development	Community Engagement
Georgia State Society Daughters of the American Revolution: Meadow Garden	- Concise daily routines and operations - Policies - Management structure	- New programming - Evolving programming	- Diverse funding sources - Financial stability - Donor development	- No leadership development; proceedings for succession	- Marketing development - Strategic partnerships
John Franklin Wren Chapter, National Society Daughters of the American Revolution: Howard Manor	- None	- None	- Membership dues	- No leadership development; proceedings for succession	- No assessment yet - Strategic partnerships with local government
The Georgia Trust: The Hay House	- Concise daily routines and operations - Policies - Management structure	- Impactful programming - Effective service delivery - Evolving programming	- Diverse funding sources - Financial stability - Donor development	- Professional and career development - Volunteer recruitment - Succession plans	- Assessment of community needs - Marketing development - Strategic partnerships
Historic Augusta, Inc. The Boyhood Home of President Woodrow Wilson	- Concise daily routines and operations - Policies - Management structure	- Impactful programming - Effective service delivery - Evolving programming	- Diverse funding sources - Financial stability - Donor development	- Professional and career development - Volunteer recruitment - Succession plans	- Assessment of community needs - Marketing development - Strategic partnerships
The Society of the Cincinnati in the State of Georgia: Harper Fowlkes House	- Concise daily routines and operations - Management structure (CHS)	- Impactful programming (CHS) - Evolving programming (CHS)	- One main funding source - Financial stability	- No professional and career development offered (CHS) - No known succession plan	- Assessment of community needs (CHS) - Marketing development (CHS) - Strategic partnerships
National Society Colonial Dames of America in the State of Georgia: Andrew Low House	- Concise daily routines and operations - Policies - Management structure	- Impactful programming - Effective service delivery - Evolving programming	- Diverse funding sources - Financial stability - Donor development	- Professional and career development - Volunteer recruitment - Succession plans	- Assessment of community needs - Marketing development - Strategic partnerships

Table 5. Comparison of Case Study Sites' 990 Forms (created by author)

Organization	Tax-exempt Status	Number of Employees	Salaries/Wages Paid (Functional Expenses)	Program Expenses	Programming
Georgia State Society National Society Daughters of the American Revolution	501(c)(3)	1	\$ 18,871.00	\$ 216,661.00	Georgia State Society/NSDAR promote historic preservation, education, and patriotism through a variety of efforts: supporting veterans and active military; giving awards and scholarships; and restoring Meadow Garden (the home of George Walton, signer of the Declaration of Independence) to better interpret history and share it with the public.
John Franklin Wren Chapter, NSDAR	501(c)(3)	0	\$ -	\$ 13,398.00	To perpetuate the memory and spirit of the men and women who achieved American independence; to promote the development of an enlightened public opinion; to foster patriotic citizenship
Georgia Trust for Historic Preservation	501(c)(3)	35	\$ 647,537.00	\$ 1,395,714.00	Hay House preservation/restoration and oversight of all properties, exhibitions, and lecture halls; heritage education, including the Talking Walls program for teachers in local communities to teach students about the area's historic value

Historic Augusta, Inc. Inc.	501(c)(3)	8	\$ 88,035.00	\$ 242,621.00	To raise awareness and educate members and the general public about Augusta's history; creation of a book detailing historical items of note in Augusta for the Augusta Book Project; Union Baptist Church repairs and maintenance
Society of the Cincinnati in the State of Georgia	501(c)(3)	0	\$ -	\$ 59,895.00	Education about the American Revolution, commemorations thereof, and other activities (e.g., heritage preservation, historic preservation, renovation, and conservation of historically significant properties in the state of Georgia)
The National Society of the Colonial Dames in the State of Georgia	501(c)(3)	25	\$ 299,559.00	\$ 525,648.00	Preservation of Andrew Low House, the Society's house; promotion of and education about United States history to members and the community at large through student essay contests and scholarships

Organizations Form 990s

Each organization is listed on their 990 Form as tax-exempt status 501(c)(3). The Georgia Trust, Historic Augusta, Inc., and NSCDA-GA all list the officers and chairs of their Board along with the main director of the over-all organization, whereas the Georgia State Society DAR, John Franklin Wren Chapter, NSDAR Society of the Cincinnati in the State of Georgia all list their hereditary societies officers and committee members.

The organizations also list their employees, along with their salaries/wages paid. The Georgia Trust pays out the most in wages with its listed staff of 35, as opposed to

both the John Franklin Wren Chapter, NSDAR and Society of the Cincinnati in the State of Georgia paying the least amount with no employees listed. (See Table 5 above.) Also listed within their finances listed on the 990 forms are their programming and the amount used on the programming. Each organization lists within their programming, historic preservation, or preservation of their historic property along with other educational programming and community outreach.

Capacity Building

When it comes capacity building, some of the organizations were dealing with challenges with that looked at each aspect in a way that allowed growth. However, while some of the organizations are dealing with challenges, they do not have the resources needed to be considered efficient and effective when it comes to capacity building.

The Organizational Development of each organization is different, with the Georgia State Society, DAR management is based on the State Regent being the like the CEO and the director reporting directly to the State Regent. The John Franklin Wren Chapter, NSDAR has no development initiated for the historic property specifically, so there is not anything to critique. The Georgia Trust's mission for the Hay House is followed and updated by the director who does report to the board. This is similar for Historic Augusta, Inc. as well as NSCDA-GA. Both of these organizations have a director who report to their boards and make sure the nonprofits follow their organizational missions. Society of the Cincinnati in the State of Georgia works with the CHS to achieve their mission and the CHS provided the museum director.

Program Development by each nonprofit is alike in that part of their mission is centered on promotion of historic preservation, however they accomplish this in different ways. Meadow Garden's director works with their board to establish programs and they in turn work with TripAdvisor to receive feedback. Howard Manor currently does not have any programming specific to the site. The Hay House has a Manager of Collections and Education who works with the site's director to create their programming, and then they assess client satisfaction through surveys. Historic Augusta, Inc.'s Executive Director works with the Board to establish programming for their site, and they also utilize TripAdvisor as outreach to the community for assessment. The CHS works with the Harper Fowlkes House director to make sure the organization is creating effective educational programming as part of its mission to promote the Harper Fowlkes House, and client satisfaction is also evaluated through the CHS for the Society of the Cincinnati in the State of Georgia. The Director and the Education and Program Manager of the Andrew Low House develop programs based on the museum's mission, and surveys are conducted to ensure efficient programming.

Revenue Development, based on their 990 forms and director interviews, are largely based on membership, with donor development being a key factor. Meadow Garden, Hay House, The Boyhood Home of Woodrow Wilson, and the Andrew Low House have diverse funding opportunities. The Harper Fowlkes House has one major source of funding, along with Howard Manor, with the major difference being that the Harper Fowlkes House resource is not based on member dues.

When it comes to Leadership Development, currently the Georgia State Society, DAR, the John Franklin Wren Chapter, and The Society of the Cincinnati in the State of

Georgia do not have leadership development and currently do not budget for it. The Georgia Trust, Historic Augusta, Inc., and NSCDA-GA not only have budgeted for leadership opportunities, but they also actively encourage their staff to take advantage of any career development prospects. This will allow those organizations that budget for it a chance to optimal management for leadership.

Each nonprofit is working community engagement. The Georgia State Society, DAR took the initiative for Meadow Garden and created an online presence to be relevant in this time. The John Franklin Wren Chapter is looking to get the community involved with their preservation plan. For the Georgia Trust, community support plays a large part in the site's funding so educational outreach has been developed in collaboration with the local county. For Historic Augusta, Inc., community support is integral to the organization realizing its mission by engaging the public in historic preservation education, so they have established community partnerships with the city, the local historic commission, and the Augusta Museum of History. The CHS is a major partner for the Society of the Cincinnati in the State of Georgia by reaching out to local schools and educational groups on the historic property's behalf. The NSCDA-GA has reached out to the local commission and other preservation organizations on the historic property's behalf, and they have hired a new public relations and marketing professional to assist with outreach.

Each of the nonprofits have different challenges when it comes to capacity building with each working within their means to accomplish goals. However, their organizations' goals being met may not be enough when it comes to being a good

custodian of their historic property if their lack of capacity building is enough to derail their future nonprofit endeavors.

Historic Site Preservation & Challenges

Although anecdotal evidence suggested preservation challenges at the start of this research, these concerns were not the largest obstacles that nonprofits faced in being effective custodians of historic properties. Some case studies were also initially assumed to exemplify good stewards of preservation. However, unexpected findings emerged.

All the featured properties, with the exception of the Harper Fowlkes House, included preservation as part of their missions to some extent. Each mission was thus suited to having a historic property. Meanwhile, the Harper Fowlkes House used the nonprofit the Coastal Heritage Society, which has preservation as part of its mission.

Preservation has perpetual funding issues. It was therefore unsurprising to see funding as a major factor for the profiled nonprofits. Preservation efforts are frequently more costly than proposed and can require extensive funds because the original problem may be only one aspect to be addressed.

All nonprofits worked with preservation consultants and had plans for preservation aside from the John Franklin Wren Chapter. Neither Howard Manor nor the Harper Fowlkes House are on the National Register of Historic Places. This omission may diminish these properties' opportunities for grant funding.

Most properties, apart from the Harper Fowlkes House and Howard Manor, had a set preservation plan and followed the SOI Standards for historic preservation. The Hay House, the Boyhood Home of President Woodrow Wilson, the Andrew Low House, and

Meadow Garden were working under the Standard for Restoration. The Harper Fowlkes House was focused on preservation as it moved forward with the house, and Howard Manor was planning to complete rehabilitation once the organization obtained funding.

Consistent governance of a historic property should be described in a preservation plan. Together with nonprofit capacity building, leadership development is essential to lowering turnover and making sure the property has perpetual resources for an administration to focus on the property and its preservation. The hereditary societies of the GSSDAR, John Franklin Wren Chapter, and the Society of the Cincinnati in the State of Georgia currently have boards with term limits that can interfere with succession. By contrast, in tandem with CHS, the Harper Fowlkes House faces less of an issue than the GSSDAR and the John Franklin Wren Chapter. The NSCDA-GA, the Georgia Trust, and Historic Augusta, Inc. engage in succession planning and leadership development. Table 6 compares key approaches to managing historic properties across all case study sites.

Table 6. Comparison of Key Approaches to Managing Historic Properties Across Case Study Sites (author)

Key Approaches:	Established Preservation Goal	Preservation Planning	Preservation Standards	Consistent Governance
Georgia State Society Daughters of the American Revolution: Meadow Garden	Listed in mission	Yes – Preservation plan	Yes – Restoration standards	Yes and no
John Franklin Wren Chapter, National Society Daughters of the American Revolution: Howard Manor	N/A	Yes – Master plan	No	No
The Georgia Trust: The Hay House	Listed in mission	Yes – Preservation plan	Yes – Restoration standards	Yes
Historic Augusta, Inc. The Boyhood Home of President Woodrow Wilson	Listed in mission	Yes – Preservation plan	Yes – Restoration standards	Yes
The Society of the Cincinnati in the State of Georgia: Harper Fowlkes House	Listed in mission of the Coastal Heritage Society	Yes and no	Yes – Preservation standards	No
National Society Colonial Dames of America in the State of Georgia: Andrew Low House	Listed in mission	Yes – Preservation plan	Yes – Restoration standards	Yes

CHAPTER V

RECOMMENDATIONS AND REFLECTIONS

The objective of this thesis was to answer the questions, “What nonprofit management organizational factors are critical in engaging local/state nonprofit membership organizations to successfully manage historic properties?” and “Are there other preservation-related factors?” This goal was met through research on topics including best practices in nonprofit management and preservation. I also defined criteria to identify six case study sites at the state and local levels and followed a case study methodology to collect data. After deciding to undertake case studies, I interviewed several stakeholders: Stephani Roohani, Director of Meadow Garden; Dr. Hanna Fowler, Chapter Regent of the John Franklin Wren Chapter, NSDAR; Ennis Willis, Director of the Hay House; Erick Montgomery, Executive Director of Historic Augusta, Inc.; Betty Youles, Director of the Harper Fowlkes House; and Rebeca G. Eddins, Director of the Andrew Low House.

Finally, I analyzed how well the six sites implemented nonprofit management best practices, communicated about and provided guidance on historic preservation, and implemented related actions. I also suggested solutions to address areas for improvement in light of prime aspects of nonprofit organizational practices, capacity building, and historic property management. The focal sites’ programming was found to be preservation-driven as reflected by programs on each property’s history and historic preservation efforts. The nonprofits also generated revenue around property preservation

as well as education about preservation and why it is necessary. The organizations' community engagement was generally successful, helping to ensure each property's preservation for future generations.

Recommendations

Addressing Preservation Challenges

This research has shed light on several recommendations to preservation concerns in order to be a better custodian of historic properties. Although local and state historic nonprofits can be good stewards, room for improvement remains. The nonprofits described herein should continue consulting with experts regarding property preservation and should move forward in implementing their preservation plans.

Funding is a clear issue. However, because Meadow Garden, the Hay House, the Boyhood Home of President Woodrow Wilson, and the Andrew Low House are either National Historic Landmarks or on the National Register, the corresponding historic preservation nonprofits should pursue preservation grants more aggressively. More training is therefore needed to provide these organizations with the confidence to seek grants. The John Franklin Wren Chapter has only relied on donors and dues to this point. If the organization can be placed on the National Register of Historic Places, funding opportunities may follow. Likewise, the Society of the Cincinnati in the State of Georgia only relies on the Society and an endowment for funding; more funding opportunities could arise if the organization were to pursue a nomination.

The short administrative terms for the two hereditary societies, GSSDAR and the John Franklin Wren Chapter, complicate administrative consistency; GSSDAR has faced

particular difficulty. Because both organizations strive to promote patriotism, education, and historic preservation, their historic properties cannot be their only focus. Historic preservation is one of three main organizational goals. Even though the current state regent has kept Meadow Garden part of the State Regent's Project to promote the nonprofit's mission, it is not required by the bylaws. Also, neither organization's bylaws mandate the nonprofit to follow a preservation plan adopted by the prior administration, although doing so is best practice as long as experts helped develop the plan.

I recommend that a nonprofit be created separate from the GSSDAR, much like how NSCDA-GA handles the care and maintenance of the Andrew Low House. The new nonprofit could continue to consult with Landmark Preservation, LLC. This new organization could address the preservation and maintenance of Meadow Garden. The new board would operate similarly to the Andrew Low House, a typical nonprofit that raises funds separately from its parent organization. Expertise could also be introduced in fields that are missing to enable the GSSDAR to focus on its tripartite mission.

The John Franklin Wren Chapter's preservation efforts are just starting. The organization does not have a board separate from the Chapter Executive Board for managing Howard Manor. Members should consider first creating a chapter committee and advisory board, tasks for which the master plan has advocated. The nonprofit could also modify its bylaws to ensure the Chapter's frequent changes in administration do not affect the new Howard Manor Board. It is especially important to better protect the property given that it is rarely used and second-floor access remains challenging due to limited funding for repairs.

The Society of the Cincinnati in the State of Georgia should allow the Coastal Heritage Society to explore additional educational programming and to potentially nominate the house for inclusion with the National Register. The property is being used as a social meeting house and is restored as needed. The Society may wish that the house not be registered because it is intended to remain a meeting location. In this case, rehabilitation would be preferable to preservation.

In terms of being a better custodian of historic preservation in general, three organizations appear to maintain high standards: Historic Augusta, Inc.; the Georgia Trust; and the NSCDA-GA. Meanwhile, the Society of the Cincinnati in the State of Georgia, the GSSDAR, and the John Franklin Wren Chapter could improve in this area and develop more tailored practices. Additionally, as nonprofits, the hereditary societies discussed here should hold fewer closed-door meetings and should post their bylaws online for ease of access. Not making their bylaws readily available could jeopardize their nonprofit status. Hereditary societies that are also nonprofits should value transparency: the public should be aware of their existence, and the organizations should not be shrouded from the society they are seeking to improve.

In summary, Historic Augusta, Inc., the Georgia Trust, and the NSCDA-GA are strong examples of custodians of historic property. GSSDAR should contemplate separating from Meadow Garden management to ensure the property is well cared for and maintained. In adopting nonprofit organization best practices through capacity building, coupled with key approaches to historic property management, Historic Augusta, Inc., the Georgia Trust, the NSCDA-GA, and GSSDAR are motivated to preserve their properties. They also underline historical significance in their educational

programming. The organizations' 990 Forms list programs on properties' history and preservation, indicating that these nonprofits engage the community to keep their respective sites from becoming imperiled. Doing so drives revenue development while allowing for preservation funding and resource accumulation to be allocated to future preservation goals.

The lack of capacity building by the John Franklin Wren Chapter, NSDAR is hurting Howard Manor, and the property is in jeopardy. The Chapter should implement its master plan and begin by gaining physical access to the second floor of its property. The Society of the Cincinnati in the State of Georgia should continue working with the CHS and improve this relationship through enhanced programming. Although the Society of the Cincinnati in the State of Georgia may continue its work with the CHS, the historic property is not free from risk given how the nonprofit runs. If the CHS decides to part ways with the Society, capacity building could break down, and the property may become endangered.

Reflections

How This Work May Affect Other Nonprofit-owned Historic Properties

Other nonprofit organizations that own historic sites can learn from this assessment of management strengths and challenges in determining whether findings apply to their situation. As introduced in Chapter 1, Craigie House—a historic home in Atlanta, Georgia—might have been positively influenced by this document. Originally owned and operated by the Atlanta Chapter, NSDAR, the Chapter sold the property in the 1990s because the house required too much funding to maintain. The Georgia Trust

named the house as one of the state's most endangered historic places in 2011. The property later collapsed during an ice storm in 2014 and was demolished in 2016.¹⁹³ Perhaps if the Atlanta Chapter had reviewed the NSCDA-GA's work with the Andrew Low House, Craigie House could have been transferred to a nonprofit with a sole mission rather than be owned by a non-profit whose mission is not dedicated to just preservation. Alternatively, the Chapter could have referred to the John Franklin Wren Chapter's plans and created a preservation plan that allowed for the house to be rehabilitated and used as a rental facility; the Atlanta Chapter may not have needed to sell it in this case. Other nonprofits can also consider how the Georgia Trust and Historic Augusta, Inc. operate in terms of management. Doing so may help organizations enhance their communication and guidance around historic preservation. A better structure could then be put in place to facilitate the flow of information between staff.

By engaging in capacity building, the studied nonprofits were able to monitor their needs and implement appropriate actions to succeed. Nonprofits with historic properties can function more effectively and sustainably by attending to capacity building. This focus would also promote the vitality of the historic properties these organizations aim to maintain. Preservation practices could further be improved statewide, enabling historic preservation nonprofits to be better custodians of their historic properties in the long term.

¹⁹³ Myfoxatlanta Staff, "Ice to blame for D.A.R. building collapse in Midtown," Fox Television Stations. February 12, 2012, (Accessed October 12, 2021), <https://web.archive.org/web/20140215131830/http://www.myfoxatlanta.com/story/24709869/2-story-brick-building-collapses-in-ne-atlanta>.

Reflections on Process and Conclusions

I could have interviewed the directors or CEOs of each parent organization. However, these organizations referred me to the nonprofits that oversaw each property as official spokespersons for each museum. The same consideration applies to hereditary societies.

Future Research

Heritage societies in other states could be studied to compare their means of historic property preservation to the profiled sites'. Historic preservation organizations in other states take preserving historic properties as their sole mission; these nonprofits could also be compared with those discussed in this thesis. Regarding the profiled properties, once Howard Manor's master plan has been implemented, research can be continued to examine whether the plan has changed.

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APPENDICES

Appendix A. Nonprofit Interviews Questions and Answers Chart (created by author)

Nonprofits & Responses:	Georgia State Society Daughters of the American Revolution: Meadow Garden	John Franklin Wren Chapter, National Society Daughters of the American Revolution: Howard Manor	The Georgia Trust: The Hay House	Historic Augusta: The Boyhood Home of President Woodrow Wilson	The Society of the Cincinnati in the State of Georgia: Harper Fowlkes House	National Society Colonial Dames of America in the State of Georgia: Andrew Low House
Nonprofit Best Practice Questions:						
Organizational Development: (human resources, financial management, mission, and planning definition, governance, legal compliance, policies and procedures, and information technology)						
Do you have a mission and vision for the organization? (Can I get a copy of them – or where can I find them?) (principles and values that guide the organization)	Yes, GSSDAR does have mission, not separate from the NSDAR.	Not separate from the main NSDAR organization.	Yes, and separate ones from the Georgia Trust	Yes, and separate ones from Historic Augusta that deals specifically with The Boyhood Home of President Woodrow Wilson	Yes, just for the Harper Fowlkes House. (Also, so does the Coastal Heritage Society.)	Yes, separate from NSCDA-GA, just for the Andrew House.
Do you have bylaws? (Can I get a copy of them – or where can I find them?)	Yes, not specific to Meadow Garden. Standing Rules, Not Publicly published.	Yes, not specific to Howard Manor, Not Publicly published.	Yes, and separate ones from the Georgia Trust, Not Publicly published.	Yes, and a section deals with The Boyhood Home of President Woodrow Wilson, Not Publicly published.	Yes, and a section deals with the Harper Fowlkes House. Also, so does the Coastal Heritage Society, Not Publicly published.	Yes, separate from NSCDA-GA, just for the Andrew House, Not Publicly published.
What is the management structure? Do you have a board or an advisory body? (How do you use it?) How many staff?	Yes	Yes - But only in the sense of the Chapter Board	Yes	Yes	Yes	Yes
Do you have a strategic plan for the organization? (Can I get a copy of them – or where can I find them?)	Yes, not public.	No	Yes, not public.	Yes, not public.	Yes, not public.	Yes, not public.
Do you have policies and plans for your organization's management? (Can I get a copy of them – or where can I find them?)	Yes, not public.	N/A	Yes, not public.	Yes, not public.	Yes, not public.	Yes, not public.
What success has your organization (or you) had in accomplishing your mission and vision? a. recent accomplishments b. past accomplishments	A Preservation Plan for Meadow Garden	Creation of the Master Plan	We have a relationship with our local Bibb County school system, and they are this year they're bringing in every eighth grade classroom in the system. So we started that in November, and we will finish it by school year late May. Every eighth grade classroom in Macon-Bibb in the house for a tour.	The main/major parts of preservation of the House completed (2001)	The whole goal of the entire CHS organization was to stay afloat, and keep staff. So as far as the strategic plan with CHS right now, we're still recovering but afloat.	Any recent successful events past COVID. Community Engagement - My first year, I was really the only person at the museum doing community engagement and the organization NSCDA-GA had in the past, they really hadn't done much of that. I would call it community outreach and engagement. And they haven't really done much of that before I got here, but I did it my first year, year and a half - I actually hired a new public relations and marketing person.
How many members does the main organization have?	8,000	50	8,000	500	115	1,600
What is your role in relation to the mission of the organization? a. Does the parent organization have a different mission? b. (Is preservation mentioned – sole purpose or one of many parts of the mission)	Yes, GSSDAR does have mission, not separate from the NSDAR.	Not separate from the main NSDAR organization.	Yes, and separate ones from the Georgia Trust	Yes, and separate ones from Historic Augusta that deals specifically with The Boyhood Home of President Woodrow Wilson	Yes, just for the Harper Fowlkes House. (Also, so does the Coastal Heritage Society.)	Yes, separate from NSCDA-GA, just for the Andrew House.

Program Development: (the systems that support effective service delivery, including processes related to outcome evaluation, client satisfaction, and expansion or improvement of services.)						
<p>What is your organization's programming strategy?</p> <p>a. Is that your role, if not is that another staff position?</p> <p>b. How does the programming come from and/or affect your organization's mission/vision?</p> <p>c. How do you define/evaluate what is a successful program? Client satisfaction? Improvement to programs?</p> <p>d. how is program development funded? Is there enough?</p> <p>c. How do you define/evaluate what is a successful program? Client satisfaction? Improvement to programs?</p> <p>e. What have been recent programming initiatives? Any ideas currently for new programming?</p>	<p>The Director helps with ideas for programming, but ultimately it is up to Meadow Garden Board.</p> <p>GSSDAR does utilize surveys and trip advisor.</p> <p>Funding depends on budget, and revenue generated by events.</p>	N/A	<p>The education and collections manager, they are in charge of developing all new programs for school children to older adults that we're going to roll out in this new fiscal year.</p> <p>The Georgia Trust does help with client satisfaction through surveys.</p>	<p>Staff position (not currently filled) and they would work with the events person and they work with committees.</p> <p>Funding depends on budget, and revenue generated by tours and events (Cotton Ball)</p>	<p>CHS operation. We do a lot with the Girl Scouts. Within the CHS organization, we have an event planner that works with land handles programming for all of the six properties.</p>	<p>It is the role of the Director and the role of education and program manager.</p> <p>Utilizes surveys and evaluates responses.</p> <p>Funding id through NSCDA-GA.</p>
Revenue Development: (system that underlies the effective funding and resource support of the organization, including diversification of funding sources, financial stability, and donor development.)						
<p>Do you have a yearly budget? a. Are your sources of revenue in the budget?</p>	Yes	No	Yes	Yes	Yes and no. Costal Heritage Society and Society of Cincinnati work separately to fund different things for the historic home	Yes
<p>From where do you receive your funding for the care of the historic property?</p> <p>a. Is it separate from the other sources given to the nonprofit</p>	<p>operating expenses are met by dues that are collected from the members of the Georgia State Society. We also do annual fundraising through our patron program. And we have a gift shop. Anyone can be a patron. It's not just specific to Georgia members. Grants, and the State Regent's Project.</p>	Member Dues	<p>Endowment, Patron memberships, special events, fundraisers, Spring Stroll of Gardens, rental of the house out for special events: (Movie filming, photo shoots, and weddings) And also visitors/ tours. Grants</p>	<p>Part of the overall budget. It's just a section of our budget up for Wilson House. (what's not counted in that part of the budget for the Wilson House is the other staff, like the director and admin and the maintenance personnel, because that's in the Historic Augusta budget.) A lot is split them between the Wilson House and the Lamar House, which is the headquarters building. (Because it's not a standalone operation, there's a lot of things that would need to be in it if it was not an integral part of Historic Augusta)</p>	<p>endowment from Alida Harper, and fundraising</p>	<p>There is an endowment, specifically for the historic property. But also through admissions and tours.</p>
<p>What are the future plans for revenue development?</p> <p>a. membership dues, events, merchandise, individual donations, grants, and fundraising?</p>	<p>Dues, fundraising, charter preservationist, grants</p>	Rental of the property, grants	Same as current budget	Same as current budget	Future fundraising for preservation.	Possible future fundraiser for a massive restoration of the iron

Leadership Development (the professional and career development, board and volunteer recruitment and development, and development of succession plans)						
Does this organization have paid staff? If yes, what qualifications do the people have? How many volunteers are there? Are there plans for staff development as well as expansion?	Yes, one paid Director. Is completing their Bachelors in History Docent Volunteers 20 No plans for more staff at the moment.	No paid staff, but a chapter of many volunteers. N/A 50 No plans at this time.	Yes, paid staff of the Hay House (3) Hay House Director, Manager of Collections and Education, Operations Manager currently only 2 positions are filled. Background of director is managing and law. Served on preservation board so familiar with property. 5 Volunteer Docents. No plans for more staff at this time.	There is a position not currently filled for Director of the House Museum. Not currently filled - but last director had a background in museums 2 tour guides paid on staff by Historic Augusta No plans for more staff at the Boyhood Home other than possibly filling the Director Position. (all other positions are Historic Augusta Staff)	Yes, 2 -but both are paid for by the Coastal Heritage Society. Background in museum management No plans for more staff at this time.	Yes, paid staff of the Andrew Low House (9) Executive Director, Education & Programs Manager, Bookkeeper, NSCDA-GA Executive Administrative Assistant, Collections Registrar, Marketing & Sales Manager, Sales Associate, Facilities Maintenance (2) Director has a professional museum background and has worked in other organizations prior. Volunteers by the NSCDA-GA No plans for more staff at this time.
Does your nonprofit use capacity building for organizational development for the health of leadership development? a. If not is there any internal staff career development? b. Organizational development – succession planning?	No. Succession in the sense of proceedings recorded for the GSSDAR and Board Minutes	No	Yes. Planned budget and educational offerings through Georgia Trust for internal staff career development. Several instructions and notes made for succession through Georgia Trust.	Yes. Planned (limited) budget for internal staff career development. Several instructions and notes made for succession.	Director Reports to the Society of Cincinnati and Coastal Heritage Foundation	Yes Planned (limited) budget for internal staff career development. Lots of notes and correspondence written with the governing body (NSCDA-GA) for succession.
What is your title within the organization? Can you describe your duties? Do you have to give a report? If so, who do you report to?	Director. I give a report to the state regent of the Georgia State Society.	Chapter Regent Well, the head of a chapter or state is called "regent" because she governs vicariously for the one presiding president – the President General. I am in charge of the business of the chapter.	Director Keeping the house safe and keeping it properly maintained is a constant. I answer to a local board, and we all answer to the state board, and my boss, who's the CEO of the trust. So it's a two-level thing.	Director Reports to Board of Directors	Director Reports to the Society of Cincinnati and Coastal Heritage Foundation	Executive Director. Give a report to the NSCDA-GA board meeting.
Community Engagement (assessment of community needs, community asset mapping, marketing development, development of strategic partnerships, and leveraging resources and collaborative relationships)						
What is your organization's community engagement strategy? a. Is that your role, if not is that another staff position? b. How does community engagement affect your organization's mission/vision? c. Who do you define as your community? (who are your community partners?)	Director and Board member for Public Relations. A new revitalized mission for branding and online outreach has developed. They are trying to engage the historical community through social media. This way a community can be built to help with the organization's mission of education and historic preservation. Community partners are Historic Augusta	N/A	Done by Director and manager of Collections and Education, as well as Georgia Trust. The community support is a big part of how they generate funding resources. Educational outreach with school children and adults. Community is the local community of Macon, as well as the rest of the state of Georgia. Georgia Trust is a major partner enhancer as they reach out on the museums behalf to the local commission and other preservation organizations, including the preservation commission.	Director and whole staff will work on all of these, but the point person would be the programs manager. The community support is a big part of how they are able to meet their mission by engaging the public in historic preservation education. Community is defined as City of Augusta, the State of Georgia, and the Nation. Community Partners are the city of Augusta Georgia, local historic commission, and the Augusta Museum of History.	They do have a contract with Coastal Heritage Society to manage it for them. (The mission of Coastal Heritage Society is to provide educational experiences for the public through the preservation and presentation of the historic resources of coastal Georgia and adjacent regions.)	Done by director and programs manager. Community engagement is new, and currently a little hard. It looks different that it use to and still being planned out to help with mission of the organization. Community is local Savannah and tourists. Also the Girl Scouts. They work with the Historic Savannah foundation, HSF.

Historic Preservation Best Practice Questions:						
Are you/ the organization aware that the SOI and the NPS define historic preservation standards in this country?	Yes, worked with Landmark Preservation for SOI guidance.		Yes	Yes		Yes.
Does your organization reference the standards when taking on work on the historic resources you manage?	The consultants Landmark Preservation provided guidance and they are trained in SOI preservation	No	Yes	Historic Augusta provides the committee with information and works with them to make sure the SOI is used.	Yes, but they are utilized.	Yes
Were you provided guidance by your organization that you must use the standards?	The NSDAR offers guidance, but was not followed by Georgia until Landmark was used.		Yes, the Georgia Trust makes sure whoever takes on the renovations/preservation work is using the standards.	When renovations are preformed they are used. The Director of Historic Augusta, makes sure that all consultants and firms that work on the house are certified and knowledgeable about the SOI.	Not always, there is a boards, but as it is only the property is preserved as is, and is not taken to a particular period.	Yes, the NSCDA-GA makes sure whoever takes on the renovations/preservation work is using the standards.
Who is in charge of making sure those standards are followed? Are they trained in preservation/have experience?	Currently it is up to the consultants and the Board to make sure the SOI is being used. But that could change		The Director and Georgia Trust. Yes, the Director of the Georgia Trust is			The Director and the board of governors from the NSCDA-GA makes sure anyone who works on the house is qualified
How many properties do you currently directly care for?	1	1	GA Trust - 2 Hay House - 1	Historic Augusta - 2		1 NSCDA-GA - 2
When were they acquired and how were they acquired?	purchased	willed	willed	purchased	willed	purchased
For what purpose were they acquired?	Preservation/Chapter Meeting House/Important Historical Structure	Preservation/Chapter Meeting House	Preservation of an Important Historical Structure	Preservation of an Important Historical Structure	Meeting House	Preservation of an Important Historical Structure
If historic significance, what is that perceived to be?	George Walton Lived here, and Women's Preservation Movement. (1700s, 1900s)	One of the oldest Houses in Wrens, GA	Architecture and style. Prominent families in Georgia History (1859-1962)	President Woodrow Wilson Lived here in his childhood.	Architecture and style.	Juliette Gordon Low Lived here and held the first Girl Scout Meeting in the house.
Has historic research/documentation been done to establish its historic significance?	Lots of current research as well as documentation.	Lots of current research as well as documentation.	Lots of current research as well as documentation.	Lots of current research as well as documentation.	Lots of current research as well as documentation.	Lots of current research as well as documentation.
National Register nomination completed?	Yes, National Historic Register and National Historic Landmark	No nominations yet.	Yes, National Historic Register.	Yes, National Historic Register and National Historic Landmark	No nominations yet specifically for the house.	Yes, National Historic Register and National Historic Landmark
Is there programming created for the property? Is it used for community engagement? Revenue generation?						
Is there a preservation plan for the property?	Yes, created by Landmark Preservation.	Not yet.	Yes, constantly updated.	Yes, for renovations.	Yes, for renovations to be done.	Yes, and is still being developed.
Was a preservation specialist used to create the preservation plan for the property?	Yes, and is currently bring updated.	N/A	Yes, initially the Georgia Trust used Chris R. Sheridan & Company. But other experts have been utilized.	Yes, and a furnishing expert.	One was done by the Society of Cincinnati.	Yes, they are in consultation.
Was there a defined purpose for the use of the building? Was that accomplished?	In the process of being accomplished.	Not fully- Meeting house, rentals, and museum.	Yes, the house Hay House have been restored and interpret different periods in Hay House's history 1859-1962.	A museum to showcase the time that President Woodrow Wilson lived in the house. It was completed in 2001.	Yes - Private meeting place and public museum.	Yes, museum of the Low Family.
Was there a fundraising campaign?	There are several fundraising campaigns.	Not yet.	Yes, for preservation and renovation there is always fundraising.	Yes, the annual cotton ball has some proceeds that go the house.	By members of the Society through the society.	Yes for all renovations through the NSCDA-GA.
Did you follow the SOI Standards?	Yes, now they do thanks to consultation.	Not currently.	Yes, the Georgia Trust makes sure they are used.	Yes, for all work on the house.	Not really.	Absolutely and anyone who works on the house must show it in the Request for proposal (RFP)

<p>What do you consider the challenges of caring for this / these properties?</p>	<p>Tourism numbers -we're starting to get a little more traffic. The Walton Rehabilitation Center, which is located back behind us, is expanding their hospital into their existing parking lot. I think it (management) presents a few challenges in that the leadership of the state society changes every two years. So when that change happens, we get a new slate of Meadow Garden board members, and it's never a complete overhaul. It's never a completely new slate because some of those positions like the first and second vice region are always on the Meadow Garden board along with the state regent.</p>	<p>No help from the State Society: sent out e-mails to the State Historic Preservation Chair, the State Historian, and the local Director of Districts) I short, we need help.</p>	<p>Managing the maintenance of the house, while at the same time improving it as we restore it. And maintenance is costly. And of course, proper restoration is costly.</p>	<p>The biggest challenge is always money. Historic properties always need something done, you don't always get the grants so you have to move funds around. Personnel and keeping volunteers engaged. The problem with Augusta is that its not a mecca for tourism.</p>	<p>Preservation of the house and planning for the preservation around the tours an the Society meetings</p>	<p>Finding the time to orchestrate the different ongoing capital projects, finding the time to act like a facilities manager. When it's a small staff and you don't have staff members that cover all the variety of work that need to be done at a site, then the director has to step in and do the things that aren't being done. Funding for preservation projects and finding the right time to shut down and have them done.</p>
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