

Preserving the Preservationists

How to Attract, Nurture, and Sustain Talented Staff

A Handbook for Board Members

Prepared by the Human Capital Task Force
National Trust Statewide and Local Partners Program
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Introduction

Our work in preservation is all about finding ways to restore, sustain, steward, and cherish irreplaceable historic resources. Unfortunately, we often spend far less time doing the same for our irreplaceable *human* resources. The reasons for this are manifold and often legitimate—lack of adequate funding, for example, being the most defensible. But deferred maintenance is never a tenable option, and neither is cyclical disinvestment in the individuals we rely on to be the voices and workhorses of the preservation movement. As a board member, you are uniquely positioned to establish the personnel policies, practices, and standards that will attract qualified staff and sustain and support their efforts, so that you and your staff can work together to successfully carry out your mission to save historic places.

This handbook outlines a comprehensive package of compensation and benefits, policies and practices that goes beyond financial remuneration. It covers appropriate wage levels, comp time, healthcare, flexibility, paid time off for annual leave as well as medical and maternity leave, retirement support, and professional development including training, volunteer opportunities, and sabbaticals. It also maps out effective methods for developing a work plan that organizes efforts, sets standards for review, and allows conscientious evaluation.

In 2010 the National Trust for Historic Preservation’s Statewide and Local Partners Steering Committee began a serious investigation into the management and compensation practices of its 125 member network.¹ The goal was to begin to understand why some organizations

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grow and thrive and others seem to perpetually struggle, unable to retain and expand staff, attract funding, or meaningfully grow their programs. The findings were not unexpected, but they were compelling: Organizations that invest time, energy, and resources in their human capital, and the policies and practices that support them, experience less staff turnover and, consequently, are more effective in achieving their goals.² It became clear that organizations that conscientiously calculate and plan for the *true* expenses associated with attracting, nurturing, and sustaining staff reap the benefits in terms of the quality and commitment of their employees. Even those with modest budgets, resist the temptation to shortchange or undercapitalize their most valuable asset—talented, hard-working individual(s). These organizations make conscious choices to raise the money they need to attract the individuals they want because they understand it is the wisest and most effective way to accomplish their goals. Successful organizations do not fall prey to the old tropes “if they love what they do, they will be happy with less,” “there are so few jobs in this business they will be grateful for the opportunity,” or “we’ll get someone right out of school that won’t cost us too much.” Instead, they acknowledge “you get what you pay for” and “you lose what you have if you are unwilling to support it.” By contrast, organizations that do not adopt this approach find themselves hiring, rehiring, and hiring again with the attendant frustrations, discouragement and demoralization of staff, and wasted time and money.

Preservation organizations are certainly not alone in their struggle to attract, nurture, and sustain staff, especially high performing executive directors, but there are some peculiarities to this industry that present some added challenges. Among the most obvious is the fact that historic preservation, by its very nature, often involves contentious public debate with the executive director taking on the most public, adversarial role, and personally and professionally shouldering the consequences. In addition, as the practice of preservation grows more sophisticated, executive directors need to become schooled in ever expanding areas of expertise including real estate redevelopment, tax credit use and syndication, historic site management, and more. And finally, these executive directors often labor with limited or no staff—some 60% of Statewide and Local Partner preservation organizations have fewer than four employees, and 22 organizations—a full 21%—have just one staff member.³

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This handbook, prepared by the Statewide and Local Partners Steering Committee's Human Capital Task Force,⁴ takes a closer look at the role and significance of staff, especially the executive director, in leading historic preservation organizations, and his or her relationship to the board of directors. It explores best practices in workload management, personnel policies, and compensation and benefit practices and offers a practical guide to implementing these for your own organization.

Executive Director

We focus here primarily on the organization's top leadership position, usually the executive director, with the recognition that as a board member, you are responsible for hiring and managing that individual. He or she in turn is responsible for the rest of the staff. The executive director bears the weight of financial responsibility, staff supervision, public image, and supporting the board of directors. Success in this role requires balancing these responsibilities, often independently, without much peer support.

The Top Job at Preservation Organizations

Individuals considering top positions in historic preservation face sobering realities: Advanced degrees are almost universally required and yet preservation jobs often pay far less than other careers requiring a similar level of education. Available positions are scarce, unless candidates are willing to move to a remote community or live in a large or highly desirable community where their pay may not be commensurate with the cost of living. Despite these deterrents, our professional preservation community has grown in recent years, with increased numbers of individuals with advanced degrees, rising numbers of paid staff within organizations, and a more visible profile in local communities and entire states.

Given the limited staff at most preservation organizations, executive directors are expected to be a jack-of-all-trades. In addition to developing expertise in managing budgets, fundraising, human resources, and personnel management, they often must become experts on a wide range of subjects including real estate, community planning, affordable housing, economic development, and

environmental sustainability. Indeed, the executive director usually puts substantial amounts of energy, time, and personal commitment to secure the kinds of knowledge and experience that can take the organization in new directions. You will find that these requirements and the strain of shouldering so much responsibility for the organization's success are frequently discussed topics when executive directors meet in professional settings. Unfortunately, because most communities support only one or two nonprofit preservation organizations, the chance to network with and learn from peers is confined to annual national meetings and specialized training which is often located out of town.

Experience has shown us that some of our most successful executive directors are those that have been given the opportunity to take part in the national network of preservation leaders. Those that sit on national committees, serve on the boards of national organizations, present at conferences, and mentor their peers not only advance the reputation of their own organizations but also bring back to their work invaluable best practices, expertise, and renewed enthusiasm. Such opportunities for leadership and exchange can also happen at the state level with many statewide preservation organizations sponsoring opportunities for executive directors to meet and network, solve problems, and gain valuable training and expertise.

Specific Challenges: The Solo Director

Staffing at Statewide and Local Partner organizations varies widely with most organizations averaging fewer than four full-time staff and some 21% having just one staff person to carry out the organization's mission.⁵ This arrangement provides unique challenges. The statewide executive director, for example, must often cover vast amounts of territory as well as maintain day-to-day operations within the organization. With far-flung board representation it is difficult to maintain productive connections with individuals or respond to the needs of diverse communities. Challenges for solo directors at local preservation organizations can be equally complex. Boards of directors and their community allies often have high expectations for the level of involvement they hope to see from their executive director. This can include serving on multiple committees, advisory boards, and being an advocate on a wide range of local topics. Both statewide and local

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executive directors are expected to attend evening meetings and weekend special events. Each of these is seen as an opportunity to bring visibility to the organization, influence decision making, and, hopefully, achieve organizational objectives. At the same time such an intense schedule can be exhausting and untenable. Solo directors and their boards need to work together to set priorities, divide responsibilities, and think strategically about where to spend time and energy.

The Other Side of the Coin: Managing Staff

Solo directors may be anxious to grow their organization's capacity, but adding staff requires more management skills, the ability to delegate responsibilities, and the need to raise and oversee a larger and more complex budget. Unfortunately, few preservation organizations have the luxury of having professionals devoted to human resources. Instead, that responsibility is born by an individual, usually the executive director, who has likely received very little or no training in this area and is preoccupied with a myriad of other pressing issues. However, a lack of carefully considered personnel policies and procedures will result in uncertainty for employees and an appearance of inconsistency or arbitrariness. While it is encouraging to learn that 79% of Statewide and Local Partner organizations have a conflict of interest and/or code of conduct policy, far fewer have written sexual harassment policies and just 5% provide any kind of training on sexual harassment issues. Indeed, just 43% provide a formal orientation for new employees where policies, procedures, rights and responsibilities could be illuminated and discussed.

All of this suggests the need for us to remember that historic preservation nonprofits, like any other organization, must adhere to high standards of financial and personnel oversight. And yet, our executive directors often come to their jobs without these particular skills. If this is the case, the board should create opportunities for the executive director to learn these skills, or delegate these responsibilities to other qualified staff or board committees. Carefully developed policies and practices, put in writing and regularly reviewed, lessen the burdens on executive directors and improve staff management, morale, conduct, and productivity. And, by extension, the relieve stresses placed on you and your fellow board members, freeing you up to do the real work of the organization.

Supporting a 24 – 7 Leader

Nonprofit preservation executive directors may be asked to work a 40-hour week but most average 48 hours⁶ and report working 50- to 60-hour weeks during particularly active periods. Some 60% of statewide and local organizations address this issue by offering some form of compensation time for hours worked outside of the regular work week.⁷ Unfortunately, executive directors report that actually taking permitted compensated time can create its own challenges. They miss meetings, allow deadlines to pass, and do not complete critical work. Similarly, executive directors find it hard to take advantage of vacation time with many regularly leaving unused days on the table each year and/or reporting that they work increased hours in the weeks before and days after to make up the lost time.

Adequate financial compensation can be additionally challenging. The *2010 Compensation and Benefits Survey* suggests that the level of compensation for executive directors was mostly dependent on budget size. However, within the same budget range there was dramatic disparity in compensation rates. For example, among Statewides with a budget of \$250,000 - \$500,000, there was a difference of \$60,000 between the highest and lowest paid directors. Similarly, among locals with budgets of less than \$250,000, a full \$50,000 in compensation separated the highest and lowest paid directors.⁸ Even when taking into consideration differences in cost-of-living standards, there was no way to adequately account for such disparities. These variations suggest the need to develop a more uniform standard by which organizations can calculate compensation. While the standard should allow for regional, economic, and organizational idiosyncrasies, it should also strive to create a more rational, equitable, and sustainable system of compensation for nonprofit preservation professionals.

Financial remuneration is not the sole form of compensation that can be offered to executive directors. Indeed, many nonprofits rely on additional benefits and non-financial incentives to attract and retain good staff. For example, many Partners try to address work/life balance to compensate for lower wages. Yet, just 37% have official policies in place that allow for such benefits as flexible schedules and telecommuting.⁹ You will find that having clear and consistent policies that address these issues, and finding ways to extend other benefits—

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parking spaces, gym memberships, cell phones, generous vacation allowances—go a long way to demonstrating the organization’s commitment to the executive director.

As a board member, your role in ensuring the success of the executive director cannot be underestimated. Like compensation benefits, participation of board members varies widely between Partner organizations. While the executive director serves as the organization’s top manager, it is the board that assumes the responsibility to oversee the organization’s finances, governance, and to set policy and programmatic goals that will satisfy its mission. When board members do not fulfill these duties, organizations often fail to meet their budget and programming goals. The resulting lack of enthusiasm and effective oversight either prompts the executive director to assume a greater load, or become so demoralized that he or she leaves or allows the organization to fail.

As noted above, executive directors of preservation organizations play a unique and very visible role in advocacy issues, often taking adversarial positions on issues that play out in the public and in the press. You must work to develop policies and strategies that support the advocacy positions your executive director is asked to take, and ensure that he or she has the board’s full support.

Conclusion

Despite all of these challenges, preservation executive directors are by and large deeply committed to the organizations they serve and the missions they are charged with carrying out. In 2010 the average length of time in current positions among these executives was 7.35 years and most had been working in historic preservation for 15 years or more.¹⁰ If we understand what brings success and satisfaction to these individuals, we can find ways to replicate these for the benefit of all Statewide and Local Partners. Clearly, developing standards for compensation and identifying management practices to support these individuals is the first step.

Three Steps to Success: Planning, Review, Evaluation

The Power of the Work Plan

The primary purpose of good planning by organizations is to ensure effective use of financial and human assets. Finding ways to be efficient with time and money is crucial to the success of the organization and the mission. Work plans that clearly define the goals, objectives, activities, tasks, timeframe, financial commitment, evaluation criteria, and responsible persons or committees can help you ensure the success of your organization.

While most organizations understand the importance of strategic planning, only 48% of partner organizations work to conscientiously implement those plans through individual work plans.¹¹ Work plans for organizations with small staffs and big goals are especially important. An executive director's work plan can be easily divided into three sections: ongoing responsibilities (basic and ongoing functions of the job that recur from year to year), special activities for that fiscal year (specific, measurable outcomes, results, and products to be achieved), and employee development objectives (such as conferences, speaking opportunities, travel for work outside the state, sabbaticals, and continuing education). The work plan should contain target dates for completing the work and should list board committees, members, or other staff that may be sharing in the responsibility to complete a task. All work plans should be tied back to the organization's other plans.

Good planning in any organization means having a full complement of directional documents to guide the organization's mission and resources. We strongly encourage you to make sure your organization has a strategic plan (every 3-5 years), annual plan, development plan (annually), and business plan (per program as needed). These plans should be woven together under the mission with goals, objectives, outcomes, schedule, and responsible individuals or parties assigned. Individual work plans build on these documents by breaking down broad ideas, themes, and topics into manageable pieces with individual accountability. Arguably, having individual work plans becomes the

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most important piece in an organization's suite of plans as they outline how the complex day-to-day work will be accomplished.

Ensuring a Fair and Realistic Workload

Most statewide and local preservation organizations are all too familiar with the issue of too much work and not enough time. In many organizations, executive directors are expected to juggle administrative duties with program planning, fundraising, advocacy, member engagement, and more. A realistic workload is important in maximizing the effectiveness of the organization to carry out its mission and to serve its constituents. A realistic workload is also critical to retaining a high quality executive director and staff.

As you know, volunteer boards have widely varying levels of participation. Work plans that communicate clear goals as well as specific steps in the process to achieve those goals can help staff communicate to board members specific needs with regard to time and resources for programming and administration. While boards and staffs may *think* they know what they are expected to contribute, unwritten plans and procedures inevitably lead to confusion and conflict.

Evaluating Program Effectiveness and Staff Performance

You will find that well-designed work plans create a dynamic process by which to gauge the success or additional needs of programs and practices. While 75% of partner organizations review the performance of each employee, less than half of all partner organizations use work plans.¹² This begs the question of what exactly is being reviewed and evaluated? Work plans, coupled with accurate job descriptions, will help you and your fellow board members provide clear priorities and expectations for staff and yourselves, as well as clear and consistent measures for determining success.

By instituting conscientious work planning with specific, realistic goals, as well as evaluation procedures, you will be better able to deal with the challenges of staff workload, board/staff dynamics, and staff retention. Both staff and board members need to be part of the processes of planning and evaluation and need to make sure that evaluation

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procedures are consistent, fair, and based on criteria defined as part of the work planning process.

Compensation and Benefits

Executive directors of nonprofit organizations, especially in the historic preservation field, are known for bringing great passion to their work. They work long hours, juggle many projects at the same time on a daily basis, and are often found to put the organization ahead of themselves and their personal lives. While passion pervades the field, serving as executive director is still a job, one that deserves appropriate compensation and benefits.

Board members recognize the passion of their executive directors and are often attracted to the organization because of the strong dedicated leadership of its executive director. Unfortunately, many board members are also tempted, especially in tough economic times, to take advantage of that dedication by limiting compensation and benefits. To guard against this, you can work to set realistic expectations for what the organization can provide an executive director and create a foundation for ongoing support of and dialogue.

Only you and your board colleagues can determine what your organization can afford in terms of compensation and benefits and indeed whether or not you are in a position to responsibly support paid staff. It is important to remember never to cut corners—thinking you can get more from an executive director than you are willing to invest. Indeed, it is in everyone's best interest to figure out the true and full costs of hiring and supporting an executive director. It is only logical to assume that organizations that offer competitive wages and a full package of benefits will attract and/or retain a qualified and talented executive director.

A standard compensation and benefits package should include the following:

- Wages
- Comp Time
- Flexibility

Healthcare
Paid Time Off (Annual Leave, Medical Leave and Family Leave)
Professional Development
Retirement
Sabbaticals
Transition Plan
Volunteer Opportunities

Wages

The board of directors should develop a base salary amount for the executive director that is competitive within your region, competitive among historic preservation organizations, and commensurate with the roles and responsibilities of the position.

Creating a Baseline

Whether your executive director has chosen to make historic preservation his or her life's work, or he or she is new to the field, either way the board must treat each individual with the same amount of respect and compensation. In order to determine the appropriate salary level, you can start by reviewing Partner compensation and benefit data which is periodically collected by the National Trust for Historic Preservation. In addition, we recommend that you seek out additional information from national and regional sources. For example, many state and local nonprofit associations, chambers of commerce, and labor organizations conduct periodic research assessing compensation and benefits in the nonprofit world. They usually publish the surveys and results online, sometimes for a fee.¹³

Our research has shown that the lower the budget of a nonprofit preservation organization, the higher the percentage of the budget that is devoted to the executive director's salary. For example, the *2010 Compensation and Benefits Survey* found that organizations with budgets from \$55,000 to \$250,000 spend as much as 65% of their budget on the salary of their executive director. This compared with organizations whose budgets exceed \$500,000, where compensation rates for executive directors ranged from as low as 2.5% to no more than 15% of their budgets.¹⁴ This indicates that while larger budgets allow for more staff and programming costs and room for higher compensation for executives, smaller organizations with more limited

budgets are still committed to paying comparable wages. This ensures fair and appropriate compensation in line with the professional qualifications and responsibilities shared by all executive directors no matter the size of their budgets.

Merit and Cost-of-Living Raises and Bonuses

Once base pay is determined and the executive director hired, you will want to institute an effective job evaluation process in order to measure his or her success in achieving goals set by the board. As noted above, the best way to do this is through an annual work plan. Annual performance reviews based on the work plan open a constructive dialogue between you and your executive director. They are also the time to award cost-of-living and/or merit raises and determine bonuses.

Rewarding good performance through annual merit salary increases is perfectly acceptable. It not only serves as an incentive for the executive director, it gives the board an opportunity to acknowledge and reinforce strong performance. One way or the other, preservation professionals, like their colleagues in other fields, should also be able to expect annual cost-of-living increases. Usually amounting to about 3% of salary, these offer an incremental way to ensure that an executive director's pay keeps pace with inflation. Those organizations that forego annual cost-of-living increases will eventually find themselves having to increase pay substantially—all at one time—either because their executive director is offered a more lucrative appointment elsewhere, or they need to attract a new executive director. Keeping pace over time is certainly a wiser and more sustainable practice.

Since the work of the executive director is performance based, using a system of bonuses for achieving goals is discouraged. In fact, using bonuses creates a big gray area where nonprofit ethics become questionable. The public has no other choice but to question an organization that gives a bonus to an executive director that raises substantial funds from private sources, giving the appearance of getting a cut of the action. The nonprofit sector is not yet as experienced as the for-profit sector in developing and managing incentive pay. If you are thinking about an incentive program, consideration must be given to the nature of organization's tax-exempt mission and the increasing scrutiny of regulatory bodies such as the IRS and Attorneys General on these compensation arrangements. As part of its code of ethics, the Association of Fundraising Professionals prohibits members from tying

their compensation directly to fundraising performance. Therefore, fundraising executives and professionals who are involved in raising organizational funds must develop and use plans that consider and focus on broader, mission-related considerations in order to comply.

Besides their dedication for the mission, many directors are attracted to the field because they enjoy the small business, independent feel of an organization. For many, quality of life may be as equally important as paid compensation.

Benefits

Providing a diverse and extensive package of benefits will allow the organization to attract and retain a good executive director. You may have to work hard to provide these benefits, but the investment will pay off in the long run. The following descriptions give more insight into common benefits, their use and implementation.

Comp Time

According to the *2010 Compensation and Benefits Survey*, executive directors in historic preservation work an average of 48 hours per week. While the number of hours worked may fluctuate depending on the time of year, many executive directors routinely work 50-60 hour weeks. Having a policy that allows compensatory time for overtime work can provide just enough leeway for your organization's leader to feel he or she can take a day off after a few long weeks. Don't be surprised if additional encouragement, in the form of strong nudging from the board, is needed to get that passionate executive director to feel he or she can take time off.

Flexibility

Flexibility in the workplace comes mainly in two forms: flexibility with time and flexibility with place. Besides their dedication for the mission, many directors are attracted to the field because they enjoy the small business, independent feel of an organization. For many, quality of life may be as equally important as paid compensation. We also need to admit that, in an age of immediate and accessible information, working hours simply are not confined to 9 to 5. Executive directors can work from almost any place at almost any time, and they usually do. Allowing them to make at least limited choices about those times and places will be exceedingly welcomed. You and your board colleagues should develop policies that allow and encourage telecommuting, meetings outside the office, and flexible work hours that meet both the organization's and director's needs.

Health Insurance

Providing good health insurance for your organization's leader should be one of your highest priorities and, without question, access to a healthcare plan should be part of your compensation and benefits package. For most small organizations though, today's world of managed care is just one big complicated human resources puzzle. But even a small organization should work with a benefits management company that can assist it in accessing a range of quality plans to meet its needs. Today's healthcare plans can include from 1 to 100 staff members and include variable percentages of contributions between employer and employee.

If a managed healthcare plan is just not affordable or available for your organization, you may consider establishing a reimbursement fund for medical expenses. While this option does not cover major medical issues, it will begin to provide a benefit for your executive director's well-being. A reimbursement fund should be viewed by the board as a temporary benefit on the way to eventually moving up to a full healthcare plan.

Frequently, healthcare plans will include options to add coverage for dental and vision for an incremental additional cost. Although this may seem like an "extra," boards should definitely consider making this coverage available as an attractive incentive for employees. Other additions may include the option to purchase additional life insurance beyond your organization's policy, and a tax-free flexible spending account (FSA or cafeteria plan).

Paid Time Off (Vacation, Holiday, Medical, and Family Leave)

The title of executive director of any organization brings with it a commitment to working in a professional environment, and paid time off is associated with a professional workplace. Paid time off (PTO) comes in many forms and is defined in a variety of ways, but the two most common are: PTO that combines both vacation and sick leave into one aggregate amount of hours; and, maintaining separate accounts for sick time (medical leave) and vacation time (annual leave).

Just as you expect your organization to grow and thrive under a capable leader, so too that executive director should be encouraged to grow professionally through opportunities for training, mentoring, and education.

No matter how it's defined and accrued within your organization, providing your executive director with the appropriate amount of paid time off will support and encourage him or her to make time to take a breather. Many executive directors say that they work twice as much and twice as hard before and after vacations in order to take the time off. And rare indeed is the executive director who does not conduct some business while on vacation. Similar to comp time, board members may need to encourage the executive director to take time off. Taking regular vacations to pursue personal interests will refresh your leader, keeping him or her happy and motivated. Among Statewide and Local Partners the average number of paid vacation days was between 10 and 18 depending on years of service, complemented by an average of 10 days of paid holidays.¹⁵

Similarly, affording adequate time for employees to take care of themselves when they are sick, care for sick children or other dependants, and make time for doctors' appointments is the board's best insurance against the need for extend absences because of serious illness or family obligations. On average, Partners allowed 9 sick days per year with 92% allowing those days to be used to care for a sick dependant, and 57% of organizations rolling over at least some of unused sick time into the following year.¹⁶

Maternity/Paternity Leave

All employees in your organization should be declared eligible to take family (maternity/paternity) leave. Due to the small size of the vast majority of historic preservation organizations, they are not required by law to comply with the Federal Family Medical Leave Act. However, it is recommended your board implement a policy to follow FMLA voluntarily. This equates to a minimum of allowing 12 weeks of unpaid leave with the guarantee that the worker will not be replaced during the time out of the office.

Additional options that you should consider implementing as part of your family leave policy include:

- allowing an employee to use paid time off for their leave,
- broadening the definition of "family" to include anyone related by blood, legal custody or marriage, or a person with whom the employee has shared a mutual residence within the last year and with whom the employee has a committed relationship, and

- providing additional time off (paid or unpaid) for a principal caretaker.

Professional Development

Just as you expect your organization to grow and thrive under a capable leader, so too that executive director should be encouraged to grow professionally through opportunities for training, mentoring, and education. Professional development allows your executive director a brief respite, usually several days to a week, once or twice a year, to acquire knowledge, do some networking, or just get a refresher.

Professional development is not a vacation and should not be viewed as such by boards. Professional development gives your executive director time to take a deep breath and think about the broader direction of your organization as new ideas surface. Professional development can also inspire your executive director to come back to the office with a renewed sense of vigor for a very low cost.

Retirement

Setting up and providing access to a defined contribution plan and a professional financial planner allows your executive director to feel more secure about his or her future. The most popular type of retirement plan is the 401(k), but there are others that you may want to consider. Organizations frequently choose to match their employees' contributions, providing an additional and attractive benefit. Having a retirement plan also encourages your executive director to think about his or her future outside of the office and how all the hard work they are putting into your organization can provide for living well in their later years.

Sabbaticals

Extended time away from the office for professional development opportunities is becoming more common in the workplace.

Opportunities that can build your executive director's knowledge, connections, and enthusiasm can also bring recognition to your organization in new ways. An environment that supports the rare sabbatical can attract and keep quality executive directors.

Sabbaticals may include management training, a fellowship, authoring a book or conducting research in a new area, or a host of other opportunities that can both refresh and bring distinction to your

director and organization. Sabbaticals can be any length that is agreed upon but are typically longer than one month and less than one year. Boards should discuss policies about when an executive director is eligible for a sabbatical. Criteria may include length of time in the position and soundness of the organization's programs, fundraising, and management structure. Sabbaticals are meant to provide stimulation and challenge outside the typical office structure that will allow an individual to grow and learn. Occasionally the request may be opportunistic whereby the executive director is invited or applies for a literal once-in-a-lifetime prospect. Board members should require the executive director to report back on a regular basis as well as comprehensively at the conclusion of the sabbatical so that they understand the benefits that were derived through their support.

Transition Plan

Given the nature of their role in a small nonprofit, preservation executive directors can get to a critical point where they are concerned that the organization will shut down or fail when they leave. While not considered formally as a benefit, a good transition plan can benefit your organization immensely by ensuring that a well-managed process is in place to identify and hire a new executive director. Instituting a transition plan can also serve as notice to an executive director that he or she should never feel forced to stay in the position.

Almost all organizations will need to go through some sort of interim period between executive directors. Rather than relying on consultants or board members to take on lead positions during the transition, you should rely on existing staff or, depending on the size and budget of your organization as well as the amount of time you will be down, bring in someone from the outside. Board members' time is better spent in the search for the new director and in working with the departing executive director to make sure that as much institutional knowledge as possible is retained. Indeed, it is good practice to require regular reporting throughout a leader's tenure so that information is recorded and disseminated widely, rather than existing only in the head of the director.

Volunteer Opportunities

Your executive director is quite often viewed as a leader in your community. One of the easiest and best ways for your board to support the growth of your leader is to encourage that person to take on

volunteer opportunities in the community. Having your executive director serve on the board of another local nonprofit can help him or her better understand the dynamics of boards and engagement of board members. An example of this would be serving as a board member in a local arts organization.

Opportunities to serve on standing and short-term committees of other organizations can bring your executive director into the conversation of broader community issues. While these issues may not always be about historic preservation, they will serve as an excellent chance to network with other local leaders, explore new partnerships, and build skills. Examples of these opportunities would include serving on a committee of your local Chamber of Commerce, as a member of a local farmers' market, and on an ad-hoc committee to explore the new office location for a nonprofit museum. Similarly, taking leadership or committee roles in regional, state or national organizations such as the National Trust should be encouraged both for the personal satisfaction of the director and the benefits it accrues to the organization.

These opportunities should be discussed between the executive director and the board, so that there is a full understanding of the expectations on both sides. They should be made part of the work plan and be reviewed each year to assess their value in light of the time and travel they required.


Conclusion

Providing a complete package of compensation and benefits can be instrumental in hiring and keeping a good executive director. Organizations that have not provided all the benefits described above may be hesitant about offering them all at once. Boards must commit to providing a package that can be supported by the organization's budget. Exploring options that could provide higher wages and fewer benefits may be a better fit for your organization and acceptable to your executive director. At the end of the day, providing appropriate compensation and benefits will leave your executive director feeling rewarded for a job well done and you, the board member, secure in

ADDITIONAL RESOURCES

The *Statewide and Local Partners Organizational Assessment* includes numerous resources including sample policies.

Download a copy at

 http://www.preservationnation.org/forum/org-assessment-docs/FINAL_ORG_ASSESSMENT-with-pdfs_1.pdf

The *2010 Statewide and Local Partners Annual Report* can be found at http://www.preservationnation.org/forum/org-assessment-docs/CBSummary_Final.pdf

knowing you are doing all you can to support and motivate your executive director.

¹ For more information about the Statewide and Local Partners program visit: <http://www.preservationnation.org/about-us/partners/statewide-local-partners/>

² These findings were captured and organized into “The Statewide and Local Partners Organizational Assessment Tool,” which includes an extensive bibliography of resources and sample documents to aid organizational development.

³ *2010 Statewide and Local Partners Annual Report*, National Trust Statewide and Local Partnerships Program, page 5.

⁴ The Task Force included Kirk Huffaker, Chair, Vanessa McQuin, Elizabeth Read, and Susan West Montgomery, National Trust.

⁵ Ibid.

⁶ *2010 Compensation and Benefits Survey Findings*, National Trust Statewide and Local Partners Steering Committee, page 7.

⁷ Ibid., page 6.

⁸ Ibid., page 8.

⁹ Ibid., page 6.

¹⁰ Ibid., page 8.

¹¹ Ibid., page 3.

¹² Ibid., page 4.

¹³ Professionals for Nonprofits, a nonprofit recruiting firm, offers a look at salary and benefits surveys from several states at

[http://www.nonprofitstaffing.com/Salary-Surveys-\(1\).aspx](http://www.nonprofitstaffing.com/Salary-Surveys-(1).aspx). Michigan Nonprofit Association offers its survey

<http://www.mnaonline.org/mnapublications.aspx> and other publications for a fee. For the release of its free 2011 survey go to

http://www.ctnonprofits.org/ctnonprofits/sites/default/files/fckeditor/file/NPA_Sept11_Web.pdf, the Connecticut Association of Nonprofits released a brief summary <http://www.ctnonprofits.org/news22> with links to its publications page <http://www.ctnonprofits.org/resources/publications>

¹⁴ *2010 Compensation and Benefits Survey Findings*, page 8.

¹⁵ Ibid., page 6.

¹⁶ Ibid.