

SAVING CULTURAL RESOURCES BY
LEARNING PLACES!

by
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of the requirements for the degree

of
Doctor of Philosophy
in
American Studies

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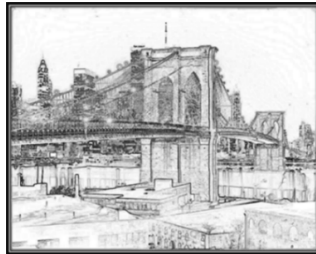
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DEDICATION

I was the first in three generations to be transplanted from New York City to the West, whose parents Isaac and Etta felt my grandparents indeed sacrificed by coming to America. My grandparents left Europe at the beginning of a horrible century of war and the Shoah ravages that catastrophically changed that continent. The Sulams never returned because of the all-consuming 1917 fire devastating their quarter of Salonica. What followed that calamity is the far worse Nazi occupation and genocide of WWII. Likewise, continued anti-Semitism and the Shoah years precluded the Whitmans of Ternopil in Ukraine from returning to the Galicia region.

It is to those ancestors that I dedicate my sincere efforts to remember the past. It is to my beloved family today that I endeavor to become the best of my clan and a model that they can be proud of for their lifetime. My best efforts could only be considered adequate without the help of my wife, Linda Carol Deutsch, and family: Dr. Ian Charles, Jesse Daniel, and Johanna Beth, and brother Dennis. They are why I chose to go on. I resolved myself to the same choice resignedly made by Samuel Beckett's character in the ending of the *Unnamable*, "You must go on. I can't go on. I'll go on."¹ My advice to them is to learn the history of wherever you are, for it will enrich your presence in that place.



Lastly, this is a tribute to you, who chose to read our shared American experiences. Together we possess a future as foretold by America's bard Walt Whitman in *Crossing Brooklyn Ferry*. He wrote of the many who crossed westward over that East River in their daily pursuits. More than mere commuters, they crossed over, like him, to enjoy this land and its American culture. We owe our commitment to his inspiration to continue to perfect the Union for those who came to America. Before there was the now century-old landmark bridge², Whitman devoted his life and words of love for an ideal of America as he wrote to you and me so we could preserve it because what he cherished about it is worth saving: *Barry Whitman-Sulam*

"What thought you have of me now, I had as much of you."³

¹ Samuel Beckett, *Unnamable*, from *Three Novels*. New York, NY: Grove Press, 2009. As a guest of the American Contemporary Theater actor, Jack BenAry, I saw director Joseph Dunn's dramatization, in Buffalo, N.Y. in 1972.

² Jet Lowe and Diane Maddex, *Industrial Eye* (Washington, D.C: Preservation Press, 1986). Re sketched overlay

³ Walt Whitman. *Leaves of Grass*, .Barnes and Noble Books, USA, 1993. Quote from *Crossing Brooklyn Ferry*, 1856.

ACKNOWLEDGEMENTS

Montana State University, where I had spent four years as an affiliated faculty member at the School of Architecture, did not mean I was familiar with the College of Letters and Science leadership, the departmental heads, staff, and faculty. I felt welcomed and assisted in ways I wish I could take the space to enumerate. As a doctoral candidate, the scholars and administrators launched several advances, including the independent American Studies Program, the Western Lands and People Center, the Ivan Doig Center. They continued to support the Humanities Institute and the Wheeler Center. The University commitments were beneficial to my studies, the community, and this state's institution's contributions to our American culture.

The tireless advice and counsel by the committee chairperson, Dr. Eric Austin, for my dissertation marathon-long trajectory added to my appreciation of the stamina of a triathlete and social scientist. Grounded in American Studies, the dissertation's placement within a historic preservation specialization has aspects of interest in public history and pluralism. Keeping the thesis grounded in American Studies' current concerns was a committee member and Program Director Robert W. Rydell's salient contribution. The dissertation's 'grounding' was aided by the prolific cultural geography scholarship of Dr. William Wyckoff. Educational technology guru Dr. Nicholas Lux inspires generations of future educators, and his inclusion is an exemplar of the many I met from the College of Education and Human Development. Finally, gratitude goes out to the Graduate School for its support of the completion of the dissertation during the worst times of the pandemic of 2020; Canvas for its Free to Teachers online course support; and the nonprofit fiscal sponsor, CascadiaNow, who supports Learning Places to "help build a grassroots movement that generates tangible and lasting change."

VITA

Barry Sulam is a registered architect in Montana, first licensed in New York, where he received a master's degree in urban planning, a Bachelor of Architecture, and a Bachelor of Science Degree from the City College of the City University of New York. This project's collaboratively perceived need was peer-reviewed after years of research, teaching, and professional practice in the rural areas all along the Rockies. Having lived and worked for four decades in the Rockies, I appreciate the millennia of cultural geography.

To those who preceded me in the preservation field, some no longer with us, I dedicate my meager effort to join their herculean ones. Their efforts mustered the votes in Congress to pass the legislation that launched many careers, including mine with the National Park Service (NPS). I did my best as I now rise to stand on the figurative shoulders of the predecessors mentioned and more that I ought to have given credits in this dissertation.

This project's need was made clear after participating in strategic planning efforts as the Regional Historical Architect of the former Southwest Regional Office of the NPS. I must thank four who trusted me as I climbed the services' management ladder: D. Battle, R.W. Sellars, R. Smith, and J.E. Cook. With their help, I gained new perspectives to participate in the vision quests and fact-finding for the cultural resource management of some fifteen hundred historic structures in the Southwest. The findings include inequities in preservation education opportunities, unnecessary losses of cultural resources in rural communities that were both preventable and regrettable, the gaps in the available federal technical preservation offices' assistance, and the uneven participation by residents of western states in federal historic preservation incentive programs. Every time an old barn was left to molder in the vast sweeping landscape of the Northern Rockies, its conservation begged for alternatives to the default decision not to save ancestral heritage-

After launching Learning Places in 2019, the enrollment brought multi-generations of problem solvers to the online course⁴. These service learners formed an online community sharing their experiential learning outcomes. They contribute after acquiring new knowledge, attitudes, and behavioral changes for their chosen cultural resource. When the volunteers act locally, they too can Save Cultural Resources by Learning Places!, in concert with a community group.

“Endure and preserve yourselves for better things.”⁵



⁴ Barry Sulam, “Saving Cultural Resources by Learning Places,” Learning Management System by Canvas, <https://canvas.instructure.com/courses/1372736> .<https://www.cascadianow.org/learning-places>.

⁵ Virgil, based on the Aeneid

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ABSTRACT

According to nationally reported citations uncovered during a recent scan of the environment, little research exists examining how a grassroots effort to offer an online course in Historic Preservation might increase service learners' competency. To address this gap, launching an intervention online and conducting research to better understand service learners' experiences with their chosen cultural resource in a community context used formative assessment technologies. The researcher used a mixed-methods design to examine how online and field experiences might support more service learners' preservation activity. For example, would authentic and robust service-learning opportunities in the online course for Historic Preservation training increase the utilization of federal preservation incentive programs? Summative assessments measuring outputs lead to a contextual comparison methodology to gauge future outcomes for more resilient communities?

Results suggested that diverse participants sampled technology-focused online continuing education serving as confirmatory events for continuing education programs in Historic Preservation. The enrolled service learners' online training affords them opportunities to apply theory and content knowledge to practice and contend with issues related to technology integration, preservation project planning, and management within a hybrid of virtual online learning and chosen real-world contexts.

The first two years of efforts had volunteers step up to protect and reduce their perceived problems of an endangered cultural resource. The prevention of unnecessary losses of cultural resources in rural communities required affordable online assistance modeled in this dissertation can be repeated and transferred whenever service learners volunteer to help save their cherished community's cultural resources. Based on the uniquely designed IDEALS(c) curriculum, anyone can participate in these grassroots actions through online learning of historic preservation fundamentals. Useful findings can improve the design of future modules for Historic Preservation field experiences for service learners and facilitate scaffolding the opportunities to help them better integrate technologies into their professional and volunteer experiences.

The pluralistic, e-democracy, technologically aided grass-root project documented in this dissertation helped others learn how to heal some of the budget cuts of late from the federal government agencies involved in cultural resources that can reduce the number of threatened historic places caring, resilient communities.

CHAPTER ONE

INTRODUCTION

*The fellow that can only see a week ahead
is always the popular fellow,
for he is looking with the crowd.
But the one that can see years ahead,
he has a telescope, but he can't make
anybody believe that he has it.*
—Will Rogers⁶

Part I. Description of the Problems

The problems and opportunities faced by communities with historic properties are served professionally by those within the vocational field known as Cultural Resource Management⁷ (CRM). Essentially, anyone in the field provides protective services, of scarce heritage elements like artifacts, in a systematic process. The many types of cultural resources include ephemeral objects, language, arts, music, rituals, and more tangible large-scale landscapes, buildings, historic districts, 'special places,' spiritual, archaeological sites, and social institutions.

The physical aspects of the resources are nonrenewable and often referred to as historic fabric. Once the attributes of a historic property are gone, they are gone forever, and nothing authentic can be reconstructed or restored. Therefore, a disturbance of an object uncovered by ground-disturbing activities requires CRM procedures to recover information for analysis and

⁶ https://www.brainyquote.com/quotes/will_rogers_122237

⁷ Thomas F. King, ed., *A Companion to Cultural Resource Management*, Blackwell Companions to Anthropology 17 (Chichester, West Sussex, UK ; Malden, MA: Wiley-Blackwell, 2011).

recordation before removal. In this way, the loss or degradation of material deemed significant can be minimized, thus preventing further loss.

Within an urban setting, the role for those specializing in the field includes design review and judgments of compatibility with the adjacent built environment. In addition, several legal regulations must be considered, such as universal access, sustainable treatments, and integrated management of natural resources, including all of the deleterious agents such as water damage, mold, pests, security, and fire safety.

“Straightforward as these concerns are, translating them into a management program is anything but simple. Contributing to this complexity⁸” are layers of bureaucratic reviews, training those who volunteer and selecting expertise if funding permits, as well as continuing education, to stay current.

For purposes of this dissertation, six tiers of essential services modeled out of the diverse plethora of interventions professionals can provide cultural resources. These six tiers rely on acquiring certain competency levels regarding a cultural resource’s protection: identify the resource and inventory several properties if in a district, document, evaluate significance, assess conditions, learn then lead, and ultimately provide stewardship. See the icon that identifies these services. The six levels depicted in the graphic below serve as pathways for those progressing upwards, stepwise, as they gain more competency.

⁸ “NPS-28” (National Park Service Management Guidelines, n.d.), www.nps.gov/history.. Definition of Cultural Resource Management

IDEALS (identity, document, evaluate, assess, learn, stewardship) is the acronym that is useful as a mnemonic for a syllabus for service learners to study then use its ‘technics,’ as I call techniques, to help save cultural resources and make communities more resilient.

The dissertation involved research and practice within the interdisciplinary American Studies Doctoral Program at Montana State University. The essence of American Studies has guided the definition of the problem, the review of the literature, and the analysis leading to the findings and conclusions to help Save Cultural Resources by Learning Places. Within American Studies, there is a multidisciplinary nexus to construct their study of a particular theme or problem of interest.

My primary interests stem from a career as a Historical Architect with the National Park Service (NPS). That area of interest is represented in the dissertation with numerous works of literature of the history of the past fifty years of this specialization in the broader profession of Cultural Resource Management. Second, I turned my attention to education before leaving college for secondary education subjects in the sciences and later in technology.

While a graduate student, I became involved in adult education. Therefore, Andragogical literature and potentialities for improving the American preservation field through public history became a path when reentering the graduate school. Lastly, I have always been engaged in community participatory planning and activism regarding the built environment. That started while getting my Master’s in Urban Planning and involved with the Community Planning Board of Greenwich Village in New York City as an urban designer for the Planning Department. American Studies has opened my interest into how the history and practices of both the state and

private sector have excluded some from full participation in the experiences of a democratic society.

Therefore, I have pursued the literature and activism of recent and past eras to understand how pluralism can influence historic preservation and adult education to achieve a more aware civil society. The Venn diagram (Figure 1) shows how the three contributed and interacted for my dissertation. If one looks at the overlaps:

1. Where Pluralism and Historic Preservation (HP) overlap is community placemaking;
2. Where Andragogy and HP overlap is continuing education in HP subject matter;
3. Where Andragogy and Pluralism overlap is the place where grassroots efforts for service-learning can begin;
4. Finally, where all three subjects' overlaps become coterminous in the center, there is the opportunity for Learning Places!

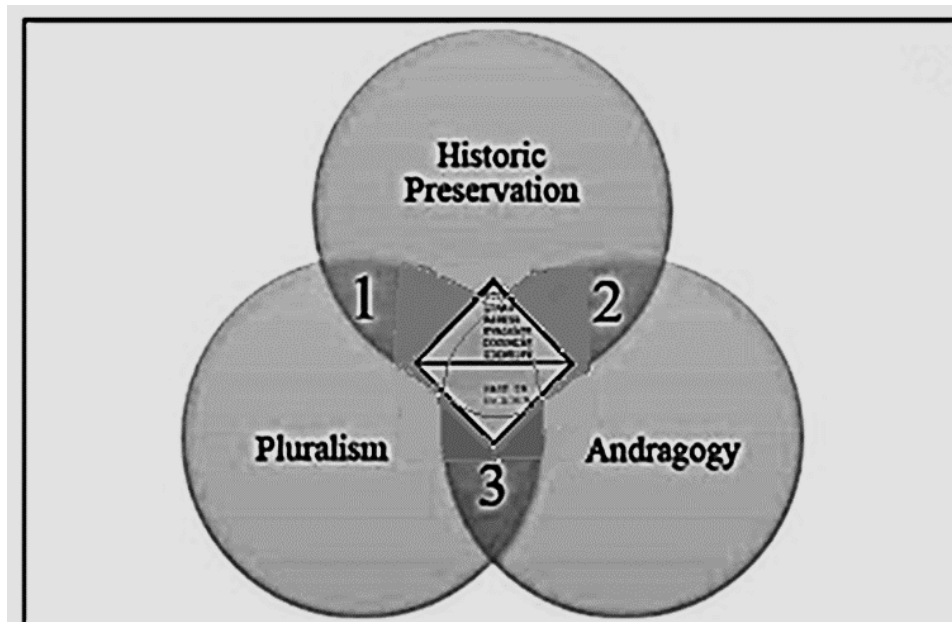


Figure 1. Dissertation's Areas of Interest as a Venn Diagram

The three contributing interests informing this dissertation project are not the norm in the distinct silos of university departmentalism. Neither the traditional history nor architecture and education disciplines had a broad enough curriculum to choose only one as my primary field of interest. Therefore, I chose a doctoral program that encourages multidisciplinary interests or themes. I agree with others who have suggested that there could be beneficial outcomes if the traditional disciplines, in their silos of higher education and professional departmentalization, joined in the efforts to help save cultural resources. Furthermore, if the areas of interest that I pursued had more multidisciplinary teams working more closely together, their synergy could make a very positive difference for the sake of the state of CRM. This hope echoes those of the essayist proposals found in the book *Bending the Future: Fifty Ideas for the Next Fifty Years of Historic Preservation in the United States*, published in 2016 for the fiftieth anniversary commemorative of the National Historic Preservation Act (NHPA).⁹ The collective goal of the editors and contributors is to help CRM go on for another half-century. Having this as my motivation, as well, guides this project. Therefore, the direction of the dissertation is to contribute my research and design, test, and analyze whether a grassroots effort can be the change needed. It aims to increase the competency of cohorts of adult service learners drawn from a small world of professionals; it increases preservation activity level in the communities, where the volunteers apply what they learn to a chosen cultural resource in need.

The project involved testing the pilot intervention of an online course that provides continuing education opportunities for those interested in historic preservation as an added

⁹ Max Page and Marla Miller, eds., *Bending the Future : Fifty Ideas for the next Fifty Years of Historic Preservation in the United States*, 1st ed., Book Collections on Project MUSE (Amherst: University of Massachusetts Press, 2016).

competency for their professional career. To test the reliability of the intervention required a methodical analysis using instruments designed for rating the preparedness of the enrollees for the online technology and the subject matter, the completion of online assessments, followed by an evaluation of the outcomes and long-term impacts of the project. The dissertation provides examples of the online syllabus, the final reports by enrolled service learners, and the results, findings, and recommendations for future study.

The evaluation derives its metrics from the three academic fields to measure the effectiveness of an adult education curriculum, the grassroots approach of voluntarism as an implementation strategy, and the changes in competencies of the single group subjects—the service learners. In addition, the knowledge, attitude, and behaviors of those volunteering to learn places to help save cultural resources are reported indicators of change. Finally, where there are gaps in the research modeling, the effective use of the online course, and the outcomes for the community, there is a discussion and recommendations for revisions.

A ‘scan of the environment’¹⁰ identified problem areas that existed many of the past fifty years since the passing of the NHPA. The search was aided by the literature and by those in practice. The problems found were intertwined, but there could be a positive effect for the CRM profession’s next fifty years if worked on together.

One can orient themselves to the dissertation’s workflow with the aid of the Mind Map¹¹ developed to show how the parts of the whole relate to each other in this project.

¹⁰ L. A. Guion, “A 10-Step Process for Environmental Scanning,” n.d., August 2010 // Volume 48 // Number 4 // Ideas at Work // v48-4iw2.A 10-Step Process for Environmental Scanning. It provides comprehensive information on the current conditions in the county and/or state that may represent potential program opportunities.

¹¹ Barry Sulam, “Mind Map by Mindmeister,” *Mind Map*, n.d., <https://www.mindmeister.com/>. The graphic was produced by using an online mind mapping tool that lets you capture, develop and share ideas visually. The term “mind map”, however, wasn’t around until the 1970s, when it was coined by the English researcher Tony Buzan <https://www.mindmeister.com/>

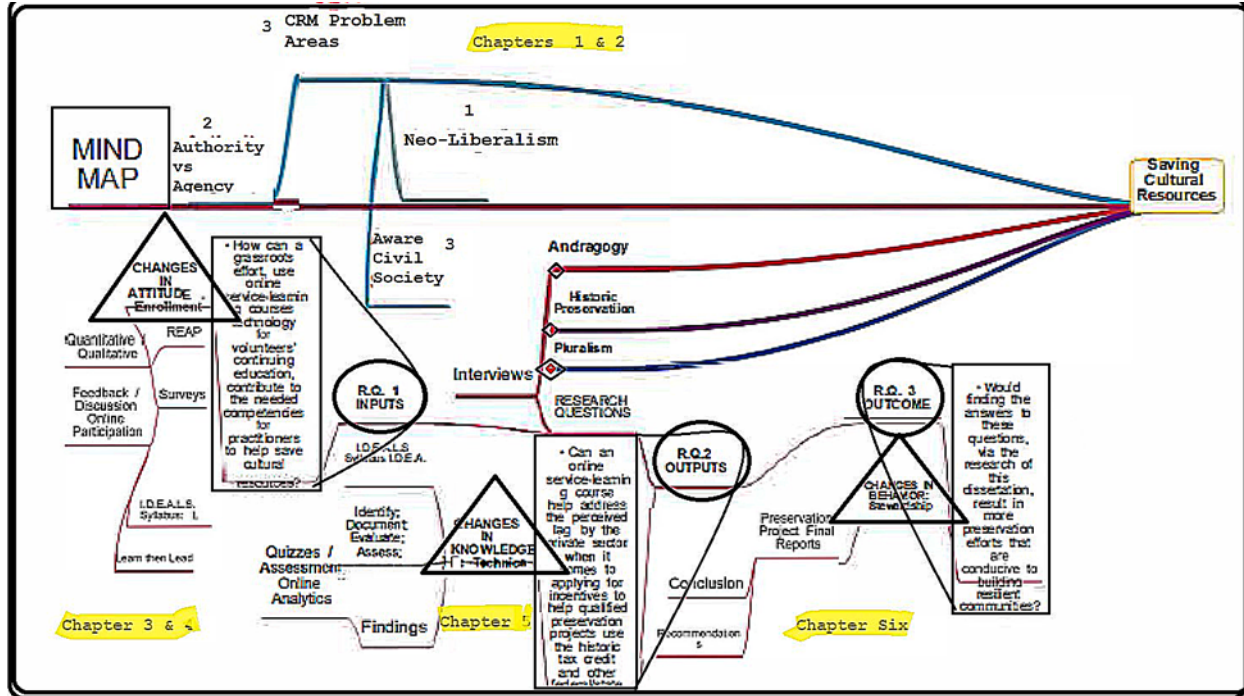


Figure 2. Mind Mapping the Dissertation Process, (zoom in on the details for clarity)

The Venn Diagram of my areas of interest for research led me to the three problem areas depicted at the top of the mind map above. Informal interviews with those in HP and online discussion posts revealed these problems are interrelated and embedded concerning civil society and global economics and have been for generations. Therefore, the hope of making a difference may rely on only one problem area of the three because it may be more readily disrupted for positive changes. That problematic remained a primary focus to test hypotheses that could yield measurable outcomes. It appears on the mind map as a need for an aware civil society (see problem area 3 in Figure 2). Having had an opportunity to help make more aware members of civil society myself, it seemed plausible that others could follow a new paradigm of informal teaching in their communities as well. Then the growing appeal to have volunteers join in could disrupt aspects of the other problematics: (1) neoliberalism and (2) authority vs. agency.

That is why of the three enumerated problem areas that the project reported on in the dissertation's research and analysis focused on the perceived need for an aware civil society. It appeared as the gateway for greater efforts. In my opinion, the paramount initial goal is an aware civil society, and it has been where past collective action has made a difference for humanity.¹² "Never believe that a few caring people cannot change the world. For indeed, that is all who ever have," said Margaret Mead at a teach-in for the first Earth Day on April 22, 1970.¹³

An aware civil society as a problem area can be more amenable to a grassroots educational offering.¹⁴ Testing this theory during the research project for the dissertation resulted in new reports of its viability. However, the other two problem areas, neoliberalism and the conflicting value systems of authority versus agency, have significant effects on cultural resources and have become deeply ingrained historically, culturally, and globally, making them more impenetrable from the grassroots starting point. The influence these interrelated problem areas have over the fate of cultural resources will need counteractions again, as in the past

¹² Mancur Olson, *The Logic of Collective Action. Public Goods and the Theory of Groups.*, vol. 2. print. ed., (Cambridge, Mass., 1971). The discussion of the public goods is similar to other references to the Tragedy of the Commons and the work on common pool resources by Ostrom. Elinor Ostrom used field studies and empirical evidence to show how cooperation by individuals leads to management of the commons. Ostrom won the Nobel Prize and identified eight "design principles" of stable local common pool resource management.

¹³ Margaret Mead and Robert B. Textor, *The World Ahead : An Anthropologist Anticipates the Future. Margaret Mead--the Study of Contemporary Western Cultures*, vol. 6 (New York: Berghahn Books, 2005).. A quote from her speech at the first Earth Day at Union Square in New York City where I was a student volunteer and escorted her from the stage after her speech. "Earth Day 1970 NYC," n.d. NY Library collection. <https://www.nypl.org/blog/2017/04/20/informed-archives-environmental>.

¹⁴ From the website *About CIVICUS*: <https://civicus.org> One definition of an aware civil society comes from the mission statement of Civicus an interantional alliance:... Our definition of civil society is broad and covers non-governmental organisations, activists, civil society coalitions and networks, protest and social movements, voluntary bodies, campaigning organisations, charities, faith-based groups, trade unions and philanthropic foundations.dedicated to strengtheuing citizen action and civil society throughout the world, " driven by a vision" worldwide community of informed , inspired, committed citizens engaged in confronting challenges facing humanity. "They devised a Civil Service Index for rating and helping nations improve. In the dissertation I devised an Historic Preservation Index or (HPI pronounced hippie).

Speaking Civil Society during the 75th Anniversary of the United Nations at the UN75: 'Civil society needs to be the conscience of the global community' Interviews 01 October 2020 Keith Best, Interim Executive Director of the World Federalist Movement-Institute for Global Policy (WFM/IGP [Executive Committee - WFM/IGP \(wfm-igp.org\)](https://wfm-igp.org))

century, through new collective actions. If one can impact the long term, it has been through incremental and by one generation sharing with the next. “Schools began with a man under a tree, who did not know he was a teacher, discussing his realizations with a few others, who did not know they were students,”¹⁵ is a view of an apocryphal primeval past as shared by Louis I. Kahn architect of the Salk Institute.

Learning has always begun at first from a grassroots level; education has been done at the local level, starting at home with the family and moving on to that apocryphal tree where someone could gather others around to share stories. To make civil society more aware, the method chosen for its immediate impact is a learning intervention. In the Western expansion of the United States, the public land was overlaid with a rectangular grid for rural settlements where every 16th and 36th section¹⁶ was set aside for public school trust land support. Community schooling started by families pooling funds and resources, building early one-room schoolhouses, and hiring a schoolmarm. Public schooling is still controlled locally after 235 years. To effect a change in the role of civil society to protect heritage values of cultural resources led to the theory that the solution can begin with an education intervention. The other two problems can be addressed by those who want to counter the perpetuation of inequities characterizing the dominant social and cultural hegemony with a more aware public.

¹⁵ Louis Kahn, “Builder of Dreams,” *The Washington Post*, October 19, 1991, www.washingtonpost.com.. His intentional design for the Salk Institute science research facility encouraged informal encounters between senior scientists and younger aides as it was considered an essential for innovation. [www.washingtonpost.com.monk's](http://www.washingtonpost.com/monk's)

¹⁶ In 1785 the Sixteenth Section of public land was set aside in the original eastern states. The additional section, the 36th, was congressionally mandated by the Oregon Territory Act in 1848. Each section is one mile square and could support more than public schools by its leases or outright sales and extraction of oil, gas, and timber.

‘Authority versus Agency’ is another form of disenfranchisement in support of the misplaced belief in a modern ‘cult of the elitist experts.’ Jane Jacobs¹⁷ rallied grassroots efforts to stop many highway lobbyists from bulldozing whole neighborhoods despite a lack of degrees that urban planners and engineers used to dismiss the little old ladies who wore tennis shoes to their picket lines. Authority versus community participation in civic decisions, such as problems affecting local zoning, planning, and historic districts, supports neoliberal agendas over traditional land uses and heritage placemaking. In CRM, authorities’ power prevails over the community or individuals’ claims of agency, forcing the use of consultants and legal remedies. The red tape demand for authoritative qualifications makes the initial processes of evaluating and nominating properties to the National Register of Historic Places a substantial front-end expense. Affordability can be a difficult barrier for small projects to comply with the requirements to utilize the federal programs before realizing any of the Historic Tax Credits (HTCs). Discussions of these effects on the CRM field will be expanded on in subsequent chapters discussing the primary problem area, a need for an Aware Civil Society.

The three problems excerpted from the above mind mapping graphic follows:

¹⁷ Jane Jacobs, *Death and Life of Great American Cities* (Vintage Press, 1961).. Having met Jane Jacobs on her return from Toronto for the ribbon cutting ceremony of the West Village Housing project, that she supported was an eye opener for both of us. Her take on how long-haired urban designers had infiltrated the ranks of the City Planning Department was remarkable. My take on her was that she fit the media descriptions of ‘those little old ladies in tennis shoes’ who repeatedly would protest the autocratic plans of the likes of Robert Moses.

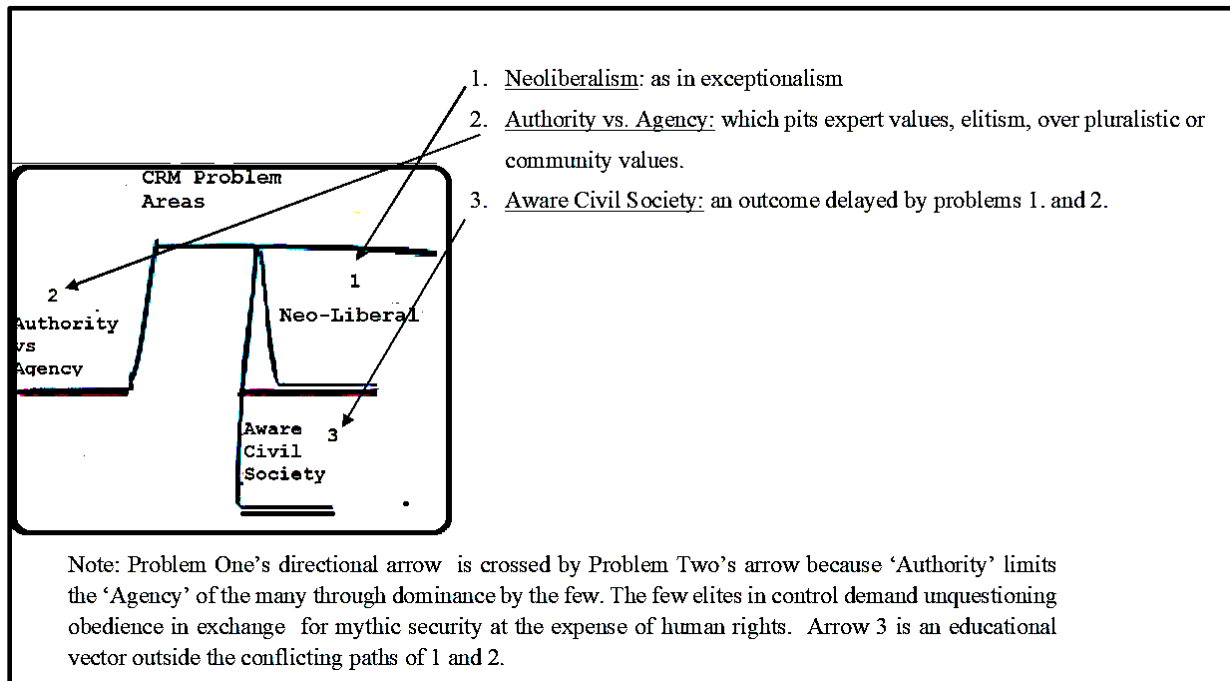


Figure 3. Mind Map Sector with Three Problem Areas

The educational vector can reveal those conflicts that cause inequities and division. Arrow 3 reveals how the few dominate the many. Domination is bought by militarized power over the less powerful others. Those uncaring about human injustices may have been more insular but will eventually suffer inner conflicts and external hardships as they become more aware and awake about the past damages to everyone's global environment. They may cling to the myth about everyone's unique individualistic birthright and a level playing field for success.

For those who, through self-education, are awake, the challenge is to collectively form a more aware civil society where everyone can be lifelong learners, and anyone can become the

needed ‘informal teachers’¹⁸ for the benefit of others. As more people become aware of alternatives to the narrow self-interests of neoliberalists, they can synergistically turn that arrow for problem area 3 into the vector for a broader-based social movement. For instance, caring about the global extirpation of other species and finding appropriate checks on the anthropogenic ‘biosphere’ disruptions¹⁹ can affect other species for millennia (by destroying habitat or over-harvesting populations of wildlife or fisheries).

The myth of the American as a rugged individual is a trope aligned with neoliberalism and has had the attention of American Studies scholars. It is a widely accepted yet misplaced belief stemming from the readily promoted and adopted myths that made previous excesses seem commendable due to natural law and a sign of inherited exceptionalism—the American Way. Neoliberalism is a label for those practicing their private brand of exceptionalism within a winner-takes-all philosophy befitting the mythical rugged individual writ large on a global scale.

Globalization, a latter-20th century phenomenon, puts an exclamation point on the lack of objectivity and moral unity among social actors; we now live in a world with different, often competing, assumptions about the world “out there,” and accompanying moral codes or rules.²⁰

It has permeated American culture and withstood the serious critical analysis of its mythic origins until there was a pivot in American Studies away from its sponsored scholarship

¹⁸ Barry Burke, “Antonio Gramsci,” n.d., <https://infed.org/mobi/antonio-gramsci-schooling-and-education/>. Antonio Gramsci’s philosophy explained a half century later, “The importance he placed on critical self-awareness, on critical social awareness, on the importance of the intellectual being part of everyday life, on the part played by so-called ‘common sense’ in maintaining the status quo and the transformational possibilities of education. All of these are now commonplace in the formation of informal educators.” <https://infed.org/mobi/antonio-gramsci-schooling-and-education/>

¹⁹ Jennifer Woodcock-Medicine Horse, “Indigenous Green Museums,” in *Emerging Scholars, Recent Research*, vol. 42nd, Montana Historical Society (Annual Conference of Montana Historical Society, Bozeman, MT: MHS, 2016), www.mhs.mt.gov.

²⁰ Paul C. Godfrey and Ben William Lewis, “Pragmatism and Pluralism: A Moral Foundation for Stakeholder Theory in the 21st Century,” Brigham Young University, 2018. <https://scholarsarchive.byu.edu/cgi/viewcontent.cgi?article>

of a new civilization on the world stage. Rugged individualism continues to be one of the suggested causes of the perceived problems in CRM today. This misbegotten theory arose repeatedly and early on in the informal interview phase of research for the dissertation in academic circles no less than in popular conversations.

Part I.1. Brief on Cultural Resource Management Problem Areas

A Historic Tax Credit (HTC) coalition was formed between the National Trust for Historic Preservation (NTHP or the Trust), private consultants, and property owners with many interesting stories about their experience with the program run by the National Park Service (NPS) and the Internal Revenue Service (IRS). For example, in a consultant's report was the observation, "The states have barely scratched the surface when it comes to utilizing the benefits of the Historic Tax Credits."²¹ This statement brings up a series of questions explored in this dissertation: Why should anyone care if a private property or public facility is inadvertently lost instead of saved for posterity?

- First, the question to ask is, why wasn't the loss prevented?
- Was it ever evaluated for its potential listing on the National Register of Historic Places (NR), which offers some government protections?
- Why care whether these older structures are afforded appropriate preservation treatments that can make the owners eligible for leveraging the assistance afforded

²¹ See Appendices for informative tables and maps by the coalition of nonprofit and consulting groups regarding utilization of the Historic Tax Credits.

by the federal historic preservation programs and ultimately take advantage of federal and state tax benefits?

- In weighing the fate of a threatened historic property, one might ask what public good the saved cultural resources do by remaining in the community rather than being razed?

I define an eight-state ‘study area’ for a retrospective comparison of the behaviors of those citizens active in historic preservation. In this way, I can find how the past twenty years of community activism have been affected by key informants' suggested factors. A key metric would be the paramount preservation program for the federal government, the HTCs, and how well the private commercial sector engages with its incentives.

The study area consists of the commonly described Northwest states of Washington, Oregon, and Idaho, east to the Northern Rockies of Montana, Wyoming, and Colorado, then Southwest to the Great Basin states of Utah and Nevada enclosing predominantly rural communities for the quantitative data analysis found in later chapters.

Study Area:

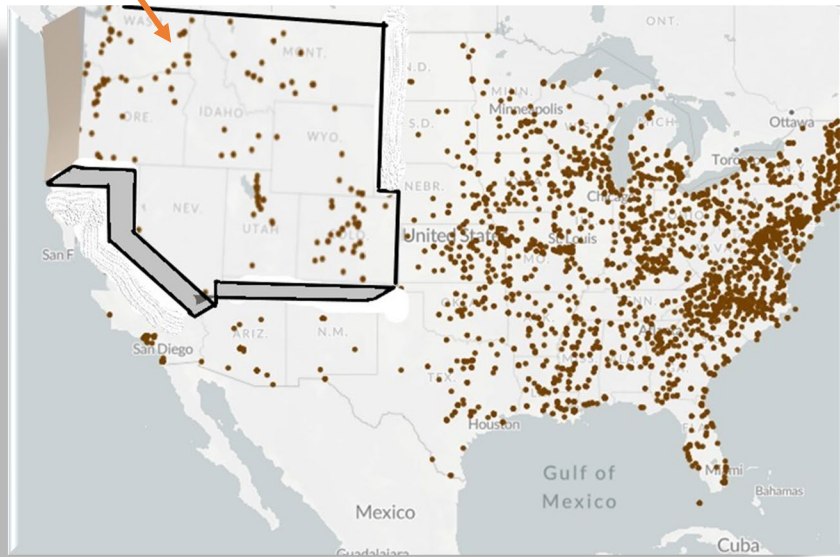


Figure 4. Historic Tax Credit (HTC) Project Locations, NPS data
Source: Novogradac, NTHP

During the informal interviews, many contacts were asked the same original question that a Washington DC Technical Preservation Services staffer posed to me: Why were Montanans lagging other states when measured by the utilization of the HTC programs?²² Those asked offered several imagined reasons. Unfortunately, none of those who were unaware of the program or its limited use in the rural Western states admitted their being uninformed and offered opinions anyways. Many architects ought to have known about this opportunity since Congress approved the HTC tax incentives over forty years ago but were unsure of what it could do for their clients and themselves.

²² Kay Weeks of the Washington Office for the NPS Technical Preservation Services asked me that question at CRM 2000 held in Santa Fe, NM for the nationwide conference by CRM professional in the NPS. The conference was delayed a year because of the devastation of homes near Los Alamos caused by an errant prescribed burn from Bandelier NM.

Those property owners stood to recoup 20-30% of the cost of a substantial rehab in the form of tax credits. The amount of credit has varied over the life of the program. None of the interviewees' testimonies revealed enough details to find clear causation for the less than robust use of the forty-year-old program's benefits. One architect who has done more than the average number of projects with HTC could not see how some projects would have 'penciled out' without the credits, "None of our historic redevelopments would have been possible without them." I quote the thoughtful response as it is worth noting, "The question is why doesn't everyone who renovates a historic building take advantage of HTCs?" The answer provided to the question was a lack of experience and ignorance of how the program works. I use the same phrasing when I say they have ignored the benefits. Others might call it resistance or intransigence, and I have used all of those expressions from the literature in this dissertation. The architect went on to add, "We have been frustrated by people's dismissal of tax credits as an option to assist the financing of a project---especially when that dismissal results in a considerably more difficult "lift" to get the project financed."²³

The deeper research shows many more applied for the HTC but failed to complete their applications and not because of the architectural reviews. The marketplace and owner investors' predisposition to be swayed by price alone and not value to the greater good may have been the more prevalent default setting.

²³A Montana architect whose work has been the subject of a lecture to the School of Architecture where I was able to interview him and continue with an email follow-up. April 23, 2019. Without a consent form I will not reveal names at this time and the final comment made is telling for any who want to explore HTC, "Our experience is derived from the school of Hard Knocks and we have made our fair share of mistakes. However, we have never failed at securing the credits when we really need them. Others—property owners as well as architects, could use the program more, but don't for whatever reason." I add, perhaps they loathe doing the uncomfortable and prefer doing the usual tried and true services for clients. Stephen R. Covey, *The 7 Habits of Highly Effective People: Restoring the Character Ethic*, Rev. ed. (New York: Free Press, 2004). suggest that those in a rut who cannot seem to work harder and harder need to occasionally sharpen their saw, by learning new tricks.

Some interviewees did have the openness to admit they had no idea there was such a thing as a tax credit for their primary professional practice—rehab of older existing structures for new uses. Others tried once but were stumped by their attempts, and their project was denied by local decisions that could have been appealed at the national level. Of course, in Washington, DC, program managers have a broader vantage point about precedents and past appeals. However, for the majority, the whole topic seemed an arcane branch of specialization and not a primary interest to the generalists' practice of architecture.

The unfamiliarity with the process and its unpredictable outcomes seemed too daunting for a non-expert commercial building owner, especially one still seeking investors who would be reluctant if the application for tax credits was not yet approved. As a result, some qualifying buildings were never nominated to the NR when the project for rehab tax credits seemed uncertain. Instead, the developer settled on a more certain outcome and took the 10% credit for older buildings not listed on the NR. Finding eligible buildings is not difficult if one wants the certainty of an already listed property because the NR list is public knowledge. There are hundreds if not thousands of potentially eligible buildings turning the fifty-year threshold for consideration for listing on the NR for every currently nominated or listed property. However, these aging buildings from the mid-twentieth-century modern architecture era, though notable, lack evaluation by appropriately qualified experts, and little in the way of subsidies are available for their nomination.

Finally, when clients were asked if they would consider searching for a location that might have an overlooked gem of a building that would be potentially eligible for the NR, and therefore a tax credit candidate, they grew more resistant. Instead, they would put all their trust

in unknown problems of new construction with its inherent rising material costs if they could find an affordable vacant lot.²⁴ Prime locations are not as affordable as those more remote ones that lack infrastructure and cause sprawl away from the urban center where the existing business concentrates. Some choose the prime location and take down anything on it to clear a lot for new construction.

The examples of externalities cost the community a price that the developers pass along forever. The most common result is sprawl, and the extra commuting distance-related pollution, from once arable farmland, turned into subdivisions, in the faster-growing counties, where the land once supported hay fields or cattle, for sale signs sprouted up from newly permitted subdivisions followed quickly by tract homes and condominiums. While investments follow the path of least resistance, the small rural towns in less prosperous counties watch as their Main Street buildings fall victim to economic obsolescence and unchecked deterioration, premature demolition, or abandonment. Moreover, many downtowns of rural communities have become modern ghost towns, and their residents drive hours to big box stores for their necessities and primary health care.

²⁴ In areas experiencing inflation in real estate costs there is a noticeable rise in the irreplaceable land costs more than most downtown historic buildings assessment values according to appraisals by county tax assessors. During inflationary periods, called bubbles for their penchant to burst suddenly, the tax assessments lag behind what is actually happening at any given moment in the market. That is a good thing for Historic Tax Credit applicants since the building's cost basis used for tax depreciation is the threshold for cost of rehab that can receive the 20% + incentive for income tax credits. When the cost basis of building is much higher than its rehab needs then no tax credit can be approved. This causes developers to do more substantial rehab which is contraindicated in the Secretary of the Interior Standards for doing the minimal change. See Paul Gleye article below:

Paul Gleye, "With Heritage So Fragile: A Critique of the Tax Credit Program for Historic Building Rehabilitation," *Journal of The American Planning Association* VL-54 (1988), doi:10.1080/01944368808976674. Several recent factors have mitigated against doing more than minimal rehab work: rising costs of building materials and the awareness that all new manufactured construction supplies use carbon and cause carbon dioxide emissions at the factory, concrete plant, steel mills and transport.

Not entirely without hope, some communities saved a few failing businesses and have had residents and employee-owned cooperative enterprises step up with the help of the Montana Cooperative Development Center.²⁵ While the Main Streets' and ancestral farm buildings go without the preventative maintenance that would extend their usefulness to the community, their rehab costs for an adaptive use becomes prohibitively expensive. All of these older income-producing buildings could be potentially eligible for listing on the NR for historic structures, making their rehab costs eligible for tax credits that can be syndicated to others who can invest in the revitalized towns. If a qualified rehab project could reuse it, then the federal tax credits can reduce the costs to make it affordable for new startups. For instance, those in Ohio can reduce their costs by 45% using the state's matching HTC. Ohio is one of the states leading the nation in utilizing HTC, while those without any state match are at the bottom decile. If more states emulated the high performers, matching the federal tax credits could result in more cooperative entrepreneurship. Perhaps this could lead to the return of essential services to eliminate food deserts caused by disinvestment, reduce CO² footprint by retaining embodied carbon in the existing buildings rather than burn more fossil fuel to make replacements, and cut down on driving distances and related pollutions. By adding the actual social costs in comparison, the reused building spaces add up to more of a community value than those low-cost franchise fast food or strip mall buildings in a comprehensive cost-benefit analysis.

In more prosperous cities in the rural West or major metropolitan areas, the adaptively used downtown buildings have been given a second chance with the appeal of popular food and

²⁵ "MCDC: Montana Cooperative Development Center," webpage, *MCDC*, (n.d.), <https://www.mcde.coop/>. MCDC has a slogan, "Building Together What Would Be Impossible to Build Alone" and their mission statement is, "To promote and develop cooperatives to meet the economic and community needs of rural Montana." <https://www.mcde.coop/>

drink establishments and boutique shopping. Tourism is the primary or secondary source of revenue for some states. However, not all obsolete buildings fare as well if their location is not ideal. Their demolition leads to another cycle of premature replacement of the built environment and adds to the unchecked carbon dioxide and other greenhouse gases for building out-of-scale structures in older historic districts. When adding high-rise buildings in older downtown areas, the availability of natural daylight is affected that adds more demand for utility services and commensurately additional parking spaces in structures. These count toward the carbon footprint, especially if applying for LEED certification. However, very few owners bother with more bureaucracy as the LEED application entails. Hopefully, the architects' design to the higher standards as a matter of practice now that most of them took LEED continuing education courses and advertise their new environmentally sensitive credential. The case for reducing carbon emissions in operating the built environment has caught on with building owners as they can readily see their energy costs reduced. Perhaps this is the way for more persuasion to have existing buildings rehabbed versus demolished and rebuilt with its enormous new embedded carbon costs. I paraphrase the famous claim by former American Institute of Architects (AIA) president Carl Elefante, 'the greenest building is the existing one repurposed for adaptive uses.'²⁶

To mitigate those externalities, progressive city managers impose an impact fee for new construction. Some states offer tax abatement for reusing historic buildings rather than incur the other costs. Added to these front-end procedures are the permits to demolish anything in the way and going through all the plan reviews, zoning checks, and public hearings and construction or

²⁶Robert A. Young and Carl Elefante, *Stewardship of the Built Environment: Sustainability, Preservation, and Reuse* (Washington, D.C: Island Press, 2012).

supply delays due to weather and other exigencies of urban life and the trade-off of going for new construction seems equally uncertain and more daunting.

Instead of finding more broad recognition of the HTC program during the interviews, there were many shrugs of shoulders. When pressed for an answer during interviews, many suggestions in diverse directions pointed to various causations for the lag. However, those conceptual ideas for the dissertation's research direction were too many to pursue in great depth. Falsifying any of those suggestions by content analysis from diverse literature using triangulation separated the imaginative ideas due to the interviewee's lack of actual experiences. Just as there is never a single silver bullet to blame for the start of wars, there is none in the commercial real estate debacles that occur frequently and wind up in litigation. Therefore, finding the answer to why there was a participation lag in utilizing the HTC is problematic. There is a documented divide between historic preservationists/architects and the architectural profession that was the subject of the recent thesis and blog posts of the AIA Historic Resources Committee.

Therefore, the facts and findings uncovered via the dissertation's research discuss these problems in some depth and are followed wherever possible with recommendations aimed at overcoming the indifference,²⁷ thereby helping future project and property owners act more sustainably as well as motivate more who are engaged in educating the next generations of architects and engineers. Hence, their services make the community more resilient.

The engineering field has, by contrast, been more responsive to incentives offered by major developers, especially the federal government agencies. Their response to the offer of

²⁷ Those who were indifferent could stop and learn or they may continue to work professionally within their narrow comfort zones. Whether it's due to being ill-informed or worse, that they did not 'want to know what they did not know' it could be viewed as an abrogation of their fiduciary responsibilities to their clients.

rewards added to their consultant fees, if they innovate a cost-saving measure, has been recognized by the value engineering clauses in their services contracts. These rewards seem to have caught their attention decades ago when the Defense Department first offered to hold down capital expenditures and life cycle expenses. The rewards would pay 10% of the costs saved to the engineers who came up with an innovation, like reduced dependence on fossil fuel for heating and cooling in government facilities. Value engineering (VE) is even more popular in the commercial sector. If the owner's accountants are informed about its benefits or a savvy construction manager wants VE in the contract documents, it can benefit in a win/win arrangement, unlike most adversarial construction contract administration.

Perhaps some carrot and stick techniques for the increased utilization of the HTC tax incentives would result in more participation by the design and building teams engaged in the rehab of historic buildings. Layering benefits under the law can yield 45% tax incentives for those aware of these multiple and mutual tax benefits for their programs. Realizing as much as a 45% savings, an architect said that many more like him could benefit from these programs. Many low-income housing developments using historic housing can layer their tax breaks and receive assistance from HUD programs to make the project a success while appropriately rehabilitating historic properties.²⁸ There will be sufficient observations in later chapters about successful cases-in-point for those who want to drill deeper into a broader array of remedies.

A long-standing source of hope and innovative remedies for the field of historic preservation came about just when citizen advocacy was sorely needed. As the United States

²⁸ For those who choose to rehab their historic properties for low income housing or in a disadvantaged census tract there are programs that will allow doubling and tripling tax incentives.

returned to more normal times, following the destructive decade of World War II, an effort by the federal government began the support of historic preservation. The NTHP is “the member-supported organization ...founded in 1949 by a congressional charter to support the preservation of America’s diverse historic buildings, neighborhoods, and heritage through its programs, resources, and advocacy.”²⁹ “Partially funded by annual congressional allocations and chartered to raise the rest through donations kept the Trust going for half a century. It became a flourishing quasi-governmental entity as a result, and when congressional funding demanded too much lobbying energy, the NTHP or the Trust went out on its own in the new millennium. Their advocacy included watchdog services as an annual activity that found and listed the most distressed historic properties nationwide.

Previously reported properties near the brink of disaster became a part of a retrospective issue of *Preservation Magazine*. The Trust’s listing of three decades of the Eleven Most Endangered Historic Places³⁰ revealed systemic problems in CRM. The 2013 List of the Eleven Most Endangered included the rural schoolhouses of Montana. One of those schools used for the abandoned school ‘poster-child photograph was in the capital city, Helena, MT, where then-Governor Steve Bullock attended. There were press releases and media coverage at one of the rural log cabin schools that rallied local preservationists to the cause of saving these iconic places. The Preserve Montana nonprofit began hiring interns to update the statewide database of surveyed one-room schoolhouses. A book documenting the extant schools was published with a

²⁹ “National Trust for Historic Preservation,” n.d., <https://savingplaces.org/>.
https://en.wikipedia.org/wiki/National_Trust_for_Historic_Preservation

³⁰ Ibid. publications for its 90000+ member donors has rallied many for the causes listed in the Preservation magazine and online newsletter: <https://savingplaces.org/americas-most-endangered-historic-places#.XzX04OhKhT0>

single donor, Charlotte Caldwell, the author of *Visions and Voices: Montana's One-Room Schoolhouses*.³¹



Figure 5. Eleven Most Endangered Historic Properties, Montana's Rural Schoolhouses Sketch, based on NTHP photo 2013

Evidently, for decades the response in cultural resource preservation activity was not enough or too late in coming without the prodding by the Trust, the ever-watchful guardian.

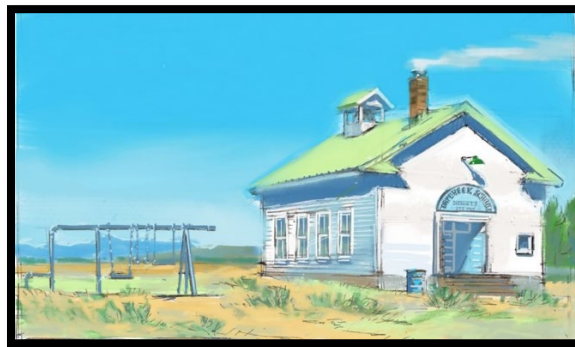


Figure 6. Dry Creek School, Belgrade, MT by Henry Sorenson, MSU

In some instances, where there was an immediate response by local preservationists' efforts, the endangered schools got a second chance. For example, Dry Creek School watercolor

³¹ Caldwell, Charlotte. *Visions and Voices: Montana's One-Room Schoolhouses*. Barn Board Press Montana History Foundation, 2012.

was a gift to the Jolly Neighbors friends' group who have adopted their grandparents' former one-room schoolhouse. In addition, advanced Architectural Graphics students do fieldwork with Professor Henry Sorenson and have documented several one-room schoolhouses.

In other cases involving complex bureaucracies, the listing of the endangered property over multiple years took much longer to marshal protection from governmental agencies with the resources to reduce the problem.

There has been much more attention paid to urban properties in distress than those in the rural historic landscape. However, preventing unnecessary loss of resources in rural communities requires affordable assistance, perhaps to a higher degree due to the shrinking economy in small towns dotting the countryside. The combined efforts of federal and state grants, new forms of ownership through associations of cooperatives, and funding from the mutual banks³² are the tools beginning to be used to mount a heritage conservation response in rural areas.

In the literature review of the interdisciplinary works in American Studies, some authors focused on tangential topics about conserving culture and heritage of language and rituals of those less represented in the dominant civil society. Glen Gendzel explored many questions raised about the topic, 'Public Memory'³³ while writing for the American Studies Association; he asked,

American society contains a vast array of overlapping memory communities whose segregated stories are told inside, outside, or alongside the mainstream hegemonic version of history. Why do commonplace "myths" about American history persist?

³² "MCDC: Montana Cooperative Development Center." The National Cooperative Bank was created to address the financial needs of an underserved market. NCB is an advocate for America's cooperatives and their members, placing special emphasis on serving the needs of communities that are economically challenged. NCB has focused on community revitalization. The employment of the cooperative model in the development of business contains access to affordable health care and affordable housing. <https://www.ncb.coop/>

³³ Glen Gendzel and Simon J. Bronner editor, "Public Memory," in *Encyclopedia of American Studies* (Baltimore: Johns Hopkins University Press, 2018), 2018), Available at: http://works.bepress.com/glen_gendzel/11/.

Why do official commemorations focus on certain aspects of the American heritage and not others? How do subgroups nurture their own historical heroes and narratives independently from the mainstream? How do these “counter-memories” gradually acquire legitimacy, recognition, and wider influence?

Gendzel adds, “The task for scholars of American Studies is to seek out the causes and effects of this enthusiasm in the past and the present.” This rise in popularity for historic preservation was explained by Diane Lea’s introduction to “A Richer Heritage, Historic Preservation in the Twenty-First Century”:

the very concept incorporates some of this nation’s most profoundly defining ideals. The ideals include...respect for private rights, concern for the larger community, appropriate roles for each level of government, government incentives for the private sector, nurturing the grassroots, assisting communities, telling the story of our collective experience.³⁴

In the federal domain, the same due diligence was called for by the President of the United States by the 1971 signing of Executive Order (EO) 11593-Protection and Enhancement of the Cultural Environment.³⁵ Nixon signed this EO for the administration of properties under the executive branch’s purview to assure that federal agencies act as good stewards of the public’s domain.

Benjamin Flowers listed some possible topics of research concerning preservation in a publication for the American Studies Association (ASA),

An overlooked aspect of historic preservation is the movement for the preservation or conservation of rural areas, where there is...more focus on vernacular

³⁴ Diane Lea, “Introduction to A Richer Heritage, Historic Preservation in the Twenty-First Century,” 2003., introduction to A Richer Heritage, Historic Preservation in the Twenty-First Century,

³⁵ “Executive Order 11593,” Federal Register Codification of Executive Orders, *National Archives*, (1971), <https://www.archives.gov/federal-register/codification/executive-order/11593.html>.. Richard M. Nixon: By virtue of the authority vested in me as President of the United States and in furtherance of the purposes and policies of the National Environmental Policy Act of 1969

architecture, on environmental considerations...retention of the agricultural economy.³⁶

Flowers expands on the emerging needs for historic preservation's relevancy: need emerged because of the economic decline wherever rural farmland is abandoned:

As the culture in which they take place grows more diverse and complex, the political and social conflicts that arise over historic preservation become more difficult to navigate. The success of the preservation movement will depend on the ability of its proponents to negotiate the subjectivities with which people approach this issue. Historic preservation often reveals as much about the cultural and social conditions of the present as of the past. Debates about whose history and culture are preserved, and which buildings and sites are significant for future generations, will no doubt continue. The goal is to find an equitable way to address such concerns.³⁷

Rural areas noted a delay in participation in the initial preservation thrust for listing properties to the NR even after a half-century since the passing of the NHPA of 1966. As for the innovative government-backed tax incentives and grants-in-aid, the rural areas have been latecomers to these federal programs and incentives and state coordinated responses to conserve the most significant places still surviving.

After forty years, the continuation of the HTC was threatened by budget-cutting fiscal conservatives in the 2016 Congress. In the public sphere afforded by the NTHP, an online campaign was mounted where concerned citizens, who were strangers to each other, rallied together for their shared interests, supported a protracted effort, and lodged their civil protest. Using online petitions, letter-writing campaigns, and lobbyists armed with nationwide data, they eventually influenced the outcome of the legislation to save HTC in 2016. The NTHP reported

³⁶ Benjamin Flowers, "Historic Preservation," in *Encyclopedia of American Studies* (Baltimore, MD: Johns Hopkins University Press, 2018), <http://eas-ref.press.jhu.edu/view?aid=8> (.. Article for the Encyclopedia of American Studies concerning historic preservation).

³⁷ Ibid. *Encyclopedia of American Studies*, ed. Simon J. Bronner (Baltimore: Johns Hopkins University Press, 2018), s.v. "Historic Preservation" (accessed August 23, 2018)

that this was their most extensive advocacy campaign, and it convinced the Senate conferees to offer a successful compromise to the House committee's plan to kill the beneficial program.³⁸ The NTHP used multimedia approaches to enlist civil society to the cause of saving the HTC. The replayed presidential taped message for the National Conference on Revitalization of America's Towns that Ronald Reagan first recorded on September 14, 1984, just before expanding the HTC benefits. In his message, Reagan was very complementary of those gathered to save small-town American "virtues," as he put it and which he likened to be the "guardians of values" aided by the Main Street Center of the NTHP. He cited the increased tax credits in 1983 rose to \$2 billion as a show of "respect for beauty, history and of course economic good sense," adding a jab against government spending on urban renewal, as well.³⁹

³⁸ "National Trust for Historic Preservation.": Nearly 13,000 people acted, sending more than 40,000 letters to Congress—the most responses ever to an advocacy action on the Trust's website.

³⁹ Ronald Reagan Presidential Library videotape released to NTHP October 27, 2017. The campaign reached more than 3.5 million people through social media, and the video featuring archival footage of President Ronald Reagan championing the HTC has been viewed more than 475,000 times across multiple platforms. The HTC campaign also generated 228 media stories and nearly 480 million media impressions. Reagan, pro-privatization and smaller government added that the HTC private sector investment exceeded the "\$6 billion taxpayers money spent on urban renewal over nine years."

Part II. Approach Used

The areas of interest that informed the research for this dissertation project come from the overlap of historic preservation, andragogy, and pluralism, as illustrated in the Venn diagram at the beginning of this chapter. With the problems uncovered through informal interviews and literature searches, several hypotheses were explored. A research design evolved by narrowing the field to those most likely to benefit from the concerted efforts of this project. Finding the answers to the three research questions could mean more help will be forthcoming from grassroots efforts to save cultural resources by a tested intervention that continues to offer help in saving cultural resources indefinitely.

An educational intervention was selected as the most viable approach to test the most promising theories. Bringing more attention by a trained cadre of volunteers to the distressed cultural resources was the prime directive for the design of a pilot intervention created on the Montana State University's virtual learning service called Desire to Learn by Brightspace (D2L) and tested on campus and in the surrounding community, revised and launched for a broader public audience. Using Canvas by Instructure for the newer version of the online course led to a year's worth of data and feedback to be methodically analyzed for a proof of concept of the program's effectiveness within a single group of users: those volunteers from the membership of the AIA. This dissertation documents this effort and reports on the social benefits derived in the

test cases. Nationwide volunteers continue to help communities save their cultural resources as new service learners enroll in ‘Learning Places.’⁴⁰

The research methods for finding plausible answers for the following research questions are explicated more fully in the Methods, Chapter Four, and the Results Chapter Five:

- How can a grassroots effort to use online service-learning courses technology for volunteers continuing education contribute to practitioners’ needed competencies to help save cultural resources?
- Can an online service-learning course help address the perceived lag⁴¹ by the private sector when applying for incentives to help qualified preservation projects use the HTC and other federal/state programs?

Furthermore, the outcomes are discussed in Chapter Six and revolve around this question:

- Would finding the answers to these questions via the research of this dissertation result in more preservation efforts conducive to building resilient communities?

Research into methods reported in the literature of the three areas of interest to me of historic preservation, andragogy, and pluralism informed the approach for this project in the development of hypotheses; weighing the conflicting theories offered by interviewees; the curriculum development for adult volunteer service; learners aided by the technology of online courses; and the core principles of CRM.

⁴⁰ Barry Sulam, “‘Saving Cultural Resources by Learning Places.’” Canvas LMS, *Saving Cultural Resources by Learning Places*, (2018), <https://www.cascadianow.org/learning-places/>. <https://www.cascadianow.org/learning-places/> A nonprofit program member fiscally sponsored by CN! Serving the communities of the states in the Northern Rockies that are part of the Cascadia bioregion. Interested members of the professions and the public who are concerned about the protection of cultural resources and the conservation of the heritage in their communities signed up as service learners.

⁴¹ The National Park Service Washington Office for External Preservation Programs manager staffer asked why there was a lag in utilizing the Historic Tax Credit program in Montana that she managed for the national office.

As found in the Venn diagram in Part I, there are overlaps of the three areas of interest that can be expanded upon:

- Where Pluralism and Historic Preservation overlap is community placemaking:

The involvement of the adult learner in selecting their course work project is preferable when designing a curriculum in both andragogy and continuing education in the professions, where an adult can actively work on a real-world problem of their choosing and acquire learning units needed for license renewal spurred many to enroll. Those who have enrolled and the key informants who reviewed and advised me about designing the ‘Intervention’ as an online course are actively saving their cherished cultural resources, helping new enrollees do the same, and informing future module revisions. In addition, the progressive planning agencies for zoning, health, police, fire protection, and political candidates and nonprofits could use the information communication technology (ICT) means to poll the constituents’ preference for policy decisions and solicit votes and fundraising around shared interests.

- Where andragogy and historic preservation overlap is continuing education in HP from andragogy (preparing teachers of adult learners), practices inform that the best courses allow the service learners to choose their project for study. Further, providing examples as in ‘case-in-point provides for models of prior students, so a learned behavior by volunteers can ensue.

Distance learning, via a technologically advantaged system, needed research into andragogy. The adults’ preparedness for online learning measurement was based on L.S. Vygotsky’s Zone

of Proximal Development.⁴² Where Andragogy and Pluralism overlap is a grassroots effort for service-learning, influences from the readings in the areas of interest about pluralism and online learning technology are literature subjects for the new e-democracy and an informed civil society regarding the emerging issues of public policy decision-making. Opposing discussion from literature about the commons and public access comes from the limits on the individual's agency in a hierarchal society. The dominant social hegemony usually dismisses the protests by social movements as illogical, aberrant grassroots behavior. By contrast, some proponents have empirical evidence that struggles against inequities are the way to make the protest known more popularly for the sake of redress by a more aware civil society.⁴³ There are alternatives like cooperatives of employee-owners that can counter those invisible forces of the marketplace that may result in more preservation activity for rural communities.⁴⁴

The online course related to social media and a nonprofit startup enterprise has turned the intervention into a project-within-a-project in order to complete the dissertation by interactively gathering data about the overlapping domains within American Studies' diverse methods.

⁴² L.S Vygotsky, *Mind in Society: The Development of Higher Psychological Processes* (Cambridge, 1978). Introduced the concept of the Zone of Proximal Development

Thought and Language. MA: Harvard University Press, 1962.

⁴³ Informed Civil Society or an Aware Civil Society are terms that I will expand on in this dissertation. In this case the term informed implies an up to date following of public policy decision-making by the body politic.

⁴⁴“MCDC: Montana Cooperative Development Center.”.During an interview with the director: for a case-in-point are several Montanan business models including the interstate trade of Cenex. A most successful cooperative effort is Mondragon. Founded 60 years ago in the Basque region of Spain, Mondragon has grown to become the world's largest worker owned cooperative. It is made up of 260 individual co-ops, employs 75,000 people in 35 countries and has annual revenues of over €12 billion - equivalent to those of that of Kellogg's or Visa. <https://www.mondragon-corporation.com/en/about-us/>

Part III. Structure of the Dissertation

How to provide a viable grassroots effort to respond to the problems previously mentioned is recounted and introduced in this next briefing on the rationale for this dissertation's approach, followed by the methods and analysis of the closing chapters.

In Chapter Two, Literature Review, I provide an extensive review that entailed my delving beyond historic preservation within the broad scope cultural resources management canon; andragogy (preparing teachers of adult learners) and the technology-aided distance learning innovations; and pluralism and the work on community, placemaking, and social movements as grassroots efforts. There can be overlaps for establishing an intervention on the common ground to help answer the research questions. According to Benjamin Flowers, rural and remote areas were not well documented in the canon of American Studies.⁴⁵ Searches for best practices uncovered articles that speak to evaluating programs and how changes in knowledge, attitude, and behaviors can be measured for inferences about the proposed improvements in adult learner education, preservation activities, and more resilient communities.

In Chapter Three, my intervention is displayed in an abridged format. It is the preferred option, selected, planned, and designed for launch online as an educational intervention offers. The plan was made manifest by a one-year pilot launch of a grassroots effort to make a positive difference in saving cultural resources. The chosen action provided both theory and methods for the conservation of local heritage and best practices. Some online course modules transmit those practices, so it can optimally result in using the leverage of the federal and state tax incentives to

⁴⁵ Benjamin Flowers, "Historic Preservation," in *Encyclopedia of American Studies* (Baltimore, MD: Johns Hopkins University Press, 2018), <http://eas-ref.press.jhu.edu/view?aid=8> (

make more affordable those qualified projects that the volunteers help enrolled in Learning Places. What appeared to be lacking after a scan of the environment⁴⁶ was a year-round portal for the grassroots effort to act as a bridge between those willing helpers, the service learners, and the host communities considering implementing a daunting historic preservation project.

The service learner can find and practice some CRM tools for preserving historic resources within the six modules of the online course. The intervention was launched on Canvas by Instructure for the long term. By working in cohorts, the chance for synergy and critical thinking can be applied to get more attention paid to neglected cultural resources as it bridges between volunteers to impart meaningful recommendations for communities' cultural resources.

Chapter Four contains the research design of mixed methods for a single group study and a plan to overcome the three problem areas from Chapter One. Where gaps were revealed, they were reconsidered in a strategic planning effort that elevated the study into a sponsored nonprofit project.

The online course analytics measured assessments of service learners' participation. Performance metrics for student work assessed using rubrics, benchmarks, outcome-based reflection. The mix of quantitative and qualitative methods involved designing unique instruments, interviews, surveys online, Rapid Ethnographic Assessment Procedures, and comparing ranked tabulations of data. The data gathering occurred before, during, and after

⁴⁶ L.A. Guion, "A 10-Step Process for Environmental Scanning." August 2010 // Volume 48 // Number 4 // Ideas at Work // v48-4iw2 A 10-Step Process for Environmental Scanning. It provides comprehensive information on the current conditions in the county and/or state that may represent potential program opportunities.

A step-by-step process used in NCCE provides a practical, straightforward guide for conducting environmental scans at the county level. While easy to use, the methods are grounded in best practices from the current literature.

enrollment in the course. Measurements of the core indicators of changes in knowledge, attitude, and behavior (KAB) enabled a single group proof of concept approach.

The mixed-methods approach systematically integrated the quantitative and qualitative throughout the evaluation phase. The objectives are benchmarked with a pre-specified set of indicators and tabulated. By using mixed methods, the analysis phase overcame any weaknesses inherent in each method if used alone. Credibility was increased for the evaluation findings when triangulating different data sources. Counterfactual approaches falsified some theories; unexpected candor brought insights from all levels of the CRM field. The evidence's consistency and reliability informed the adaptive changes in approaches and ruled out alternative methods as new, unanticipated data gathered. Numerical and textual analysis from multiple data sources provides tabulations, mapping observable behaviors while online, and instructor perspectives that enable judgments.

In Chapter Five, the focus of the analysis shifts to the achievement of the goals and objectives was the individual learner's cumulative data gathered to measure resulting changes in their competency, attitude, and behaviors. Also, the larger picture that was the subject of data gathering includes the organizations they served or belonged to and society in general and locally. The evaluation of the program as an online intervention, where several cohorts enrolled during the pilot year, provided valuable feedback from the participants and key advisors via a post-course survey completed online and tabulated.

The D2L learning management system (LMS) initial course helped devise the next public offering phase of educational programming. Each LMS has built-in quantitative analytics that

provided empirical evidence of the service learners' level of preparation⁴⁷ before the course, participation in discussion posts, the number of hours online and pages visited, scores on quizzes, streaming videos watched, quiz attempts, and feedback for improving ease of use online.

Useful and insightful data made results measurable, and instructor feedback was valuable; what was learned became clear. In the long term, the impactful-ness of the Intervention may prove its continued availability to be worthwhile by the feedback from each successive cohort. In two years, ten cohorts formed since the online course launch to the public, and forty-two enrolled service learners played a role in the course evaluation. While they could enhance their competencies commensurate with the efforts expended in the course, they also advanced preservation projects with their community hosts.

In Chapter Six, I present my conclusions and recommendations. First, the cohorts' participation in the course yielded data for an analysis of the findings to predict the efficacy of a continuation of the project. Second, the explication of the nascent outcomes for this project shows the expected reliability that just such an intervention has a place in the catalog of continuing education for the small world of practitioners. Third, the promise of a working solution that helped inform the focused research questions was modified and adapted to the realities of a competitive continuing education forum. Finally, each cohort's participation informed future choices of whether and how to further the prior body of work via revisions or

⁴⁷ Nicholas Lux, Nigel Waterton, and AW Bangert, et al, "The Development of an Instrument to Assess Preservice Teacher's Technological Pedagogical Content Knowledge," *Journal of Educational Computing Research*, SITE 2012--Society for Information Technology & Teacher Education International Conference., 2011.

additional modules for the online course. Recommending needed changes in the CRM field follows the discussions.

Service learners shared examples of final reports, and conceptual design projects exemplify presentation types to serve as templates for future cohorts. Finally, the anticipated outcomes are discussed as some were achieved, or if not, suggestions focused on the measured improvements in knowledge, attitudes, and behaviors.

In addition to these substantive chapters, the Appendix contains tables, screenshots from the Intervention as an online course called Learning Places, and examples of final reports or exemplars offered as models for online learners to use when crafting their final report. The following chart shows the chapter structure for the dissertation and is displayed at the beginning of each chapter for reference:

Table 1. Structure of Chapters

Chapter One	Chapter Two	Chapter Three	Chapter Four	Chapter Five	Chapter Six
I. Description of Three Problems	I. Historic Preservation Literature	I. Objectives, Content, and Flow	I. Introduction to Methods	I. Results and Findings RQ I	I. Introduction Three Research Questions
II. Approach Used.	II. Pluralism Literature	Curriculum: IDEALS Knowledge, Attitude, Behavior	II. Methods to Answer RQ 1 RQ 2 1. Formative 2. Summative	II. Formative and Summative Evaluations Results	II. Conclusion Three Problem Areas Discussion
III. Structure of Dissertation	III. Andragogy Literature	III. Literature Key Ideas	III. Methods: 3. REAP; 4. Comparisons	III. REAP and Comparisons RQ II	III. Recommend 3 Proposals

CHAPTER TWO

LITERATURE REVIEW

A limited review of the relevant literature selected from a larger body of work consulted for the dissertation will identify salient points. In this interdisciplinary literature review, the highlights will be shared that informed the project that was an intentional pursuit to advance the historic preservation activities in rural areas.

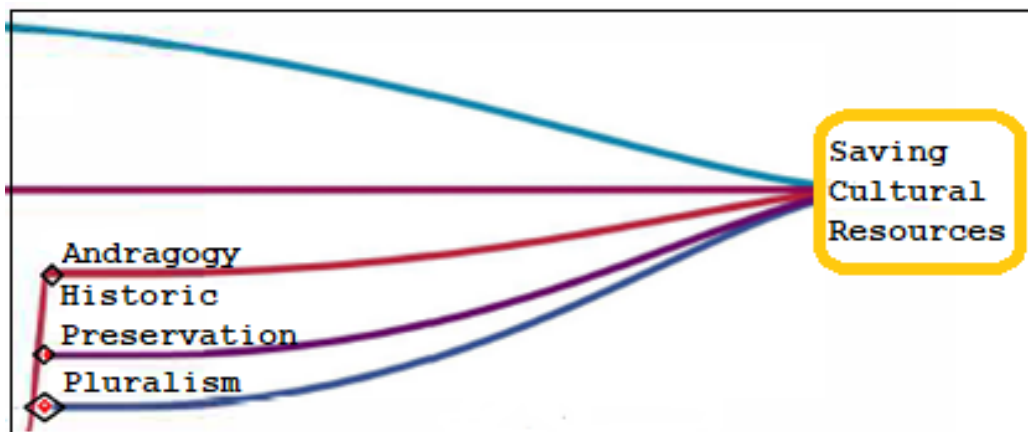


Figure 7. Mind Map Segment

The effort first looked into the closely related work found in American Studies, specifically historic preservation or heritage conservation within Public History and Humanities. Secondly, I searched for participatory community efforts for heritage conservation as found in the literature concerning pluralism and its innovative case studies. The literature for andragogy was a personal choice for examining ways to impact the perceived problems discussed in Chapter One. This third field engages in e-learning technology and was new, therefore scarce, in

architecture and historic preservation. This scarcity led to taking courses and launching an online practice pilot course for adult continuing education.



Figure 8. Venn Diagram with Icons

The Venn diagram above (from Chapter One) introduced those salient areas of my interest in andragogy, pluralism, and historic preservation. Under the overarching umbrella of American Studies, the literature supported this pursuit that locates the effort geographically and temporally to the past few centuries that typically frame current CRM. Temporally limiting the study of the past half-century was due to the recent fiftieth anniversary of the passing of the NHPA of 1966. The event caused several new publications by academicians and retrospective conferences, which led to many action plans for the next fifty years that informed this chapter. Contemporary authors' competing theories and pertinent research questions for changes inspired this dissertation project's engagement as a community participatory intervention experience. The following review presents those competing arguments that help test alternative solutions before making recommendations based on the outcomes of this multi-year shared effort.

Outlined below are categories of contributing literature drawing from the three areas of interest to me, as illustrated by the Venn diagram above. All of the chosen literature shed light on the primary problem area—a need for a more aware civil society.⁴⁸

I. Historic Preservation

1. Framing the Sources
2. American Studies, Public History, and Historic Sites
3. Cultural Homogeneity lacks Diversity / Rural in HP.

II. Pluralism:

1. Public Memory and the Sense of Place
2. Underrepresented populations

III. Andragogy

1. Technology-assisted E-Learning,
2. Pluralism in democracy through E-Participation
3. Evaluation of the current preservation education initiatives

Part I Historic Preservation Literature

This first part of the three bodies of literature review contains three subparts:

I.1 Framing the Sources

I.2 American Studies, Public History, and Historic Sites

I.3 Cultural Homogeneity lacks Diversity / Rural in HP

⁴⁸ The other two problem areas identified in Chapter One were Authority and Agency, and the review of its literature is touched on in subheadings I.2 and I.3, and all of II. Pluralism and Andragogy III.2 and III.3. The Neoliberalism problem of a global political economy features in subheadings I.3, II.2, and II.3 and III.2 of the literature reviewed.

Part I.1 Framing the Sources:

As an American Studies project, this review respects some geographic limits for the span and scope of the readings within temporal boundaries. Therefore, international cases beyond the continental USA were not read in-depth unless they were precedent-setting or affected the law and practices of CRM.⁴⁹ Likewise, the temporal frames of reference limited the searches between the 17th century to the present era unless cause and consequence were affecting American CRM practices. Thus, a narrower scan of the sources focuses on the recent past century and a half of CRM and its possible trajectory for the next fifty years.

Within the recent past timelines, literature reviews did not go into the depths of early colonial resources and their protection before the advent of the NHPA or its antecedent, the 1935 Historic Sites Act precedent. Nevertheless, the earlier history is a well-documented subject, from the historic preservation of New England antiquities up to the reconstruction at Colonial Williamsburg, within the seminal works of Charles B. Hosmer.⁵⁰ Thus, the recent history of preservation education and CRM became the primary object of this review. It informed the choice of a new intervention, the methods for analysis, the challenges, and the opportunities of the current political economy for future recommendations.

⁴⁹ During the course of the dissertation, I will make comparisons with the United Kingdom's Royal Institute of Architects proactive standards for working on their listed properties. Where some properties are listed in England as having been built over eight centuries ago and still in use, such as the White Tower of the Tower of London, it puts the American concern for heritage buildings in a poor light. From my hometown New York City, the island of Manhattan has less than a handful of originally built colonial era residential wooden structures i.e. Alexander Hamilton's Grange, where I served as restoration architect with the NPS' Denver Service Center from 1978-80, it was moved to a city park next to CCNY.

⁵⁰ Charles B. Hosmer, *Presence of the Past : A History of the Preservation Movement in the United States before Williamsburg* (New York: G.P. Putnam & Sons, 1965).

_____, *Preservation Comes of Age: From Williamsburg to the National Trust, 1926-1949*. Charlottesville: Published for the Preservation Press, National Trust for Historic Preservation in the United States by the University Press of Virginia, 1981.

The evolution of CRM broadened from antiquarian pursuits of the 18th and 19th centuries into the current national programs that sustain diverse cultural practices of a pluralistic society. Although cultural diversity persists in American civil society, so has the economic and social stratification, the racial divide, and along the spectrum of educational opportunity and attainment. The concern with familial heritage remains a role for generations who upheld their lineage, as an ‘in-group’ of the dominant hegemony members of civil society, through the twentieth century.

Global displacements and massive numbers of contemporary refugee populations, consequences of war and looting, the prosperity of some black-market traders dealing in antique objet d’art are the current concerns for heritage conservation. Professionals from over a hundred countries sought out cooperative international charters to cover a broader field than structural preservation. The global consciousness expanded beyond the sovereign cultural heritage concern to that of the humanities in common with all nations.⁵¹

As the literature review surveyed my areas of interest involved in this dissertation, it sought critical scholarship at the intersections of pluralism (grassroots efforts) and andragogy (online courses for teachers of adult learners) to improve competencies in historic preservation. Reports of historic preservation activities aiding community-based actions in the urban areas, especially near universities doing outreach, have increased. More remote rural areas were not

⁵¹ Piero Gazzola, Chair and The Committee for drafting the “International Charter for the Conservation and Restoration of Monuments and Sites (The Venice Charter 1964).” International Council on Monuments and Sites, Adopted by ICOMOS in 1965. https://www.icomos.org/charters/venice_e.pdf. Museum professionals agreed to the first Athens Charter in 1931 followed by the First International Congress of Architects and Specialists of Historic Buildings that met in 1957 in Paris and later for the 1964 Venice Charter. These charters are sets of guidelines, an international framework for the conservation and restoration of historic buildings and the impetus for passing of the NHPA in 1966 that was the most comprehensive cultural resource management law of the United States..

well documented in the body of the readings; also, cooperatives' involvement in preservation work received scant attention. Continued searches for best practices did reveal articles or chapters, sharing growing evidence that is hopeful. Studies were read that measure the changes in competency for career training as measured by indicators of gains in knowledge, attitude, and behavior, presumed to enhance professional performance. These studies acted as proxies when needing to predict that those who pursue continuing education online for CRM will someday impact preservation activities and make communities more resilient as a result.

Spurred on to search more of the literature because gaps were found added to the challenges of this project. Also, there was reportedly little unanimity in the canon as yet. That lack of unanimity was the *raison d'être* for a conference to find common ground for preservation education. The *Preservation Education: Sharing Best Practices and Finding Common Ground* conference's organizers called for papers to discuss issues and topics that most needed addressing, including:

- defining the discipline
- employment, and relationship to job skills
- communication, collaboration, and bridging across boundaries
- ethics and quality issues
- curriculum design
- outcomes and assessment methods⁵²

⁵² Barry L Stiefel and Jeremy C. Wells, eds., *Preservation Education: Sharing Best Practices and Finding Common Ground* (Hanover and London: University Press of New England, 2014).

At the conference's concluding discussion, chaired by Barry Stiefel and Jeremy C. Wells,⁵³ was the disturbing closing summary of six points:

1. There is no agreement across academics and practitioners (about) what defines "historic preservation" or "heritage conservation." as a discipline.
2. The relationship between employment and job skills is largely unknown.
3. We need to work much harder at communication, collaboration, and bridging across disciplinary boundaries; conflict is an inevitable part of (the) practice.
4. We have significant ethical and quality issues in the field that are not being addressed.
5. There is very little guidance on curriculum design.
6. There is very little guidance/scholarship on outcomes and assessment methods (student learning outcomes) for the field.⁵⁴

Stiefel and Wells left the conferees with these thoughts about the future of preservation education; it "engenders far more questions than answers."⁵⁵ The lack of agreement amongst educational leaders regarding the fundamentals, like cored endeavors of the discipline, can create more future problems for working collaboratively with other disciplinary researchers and professionals.⁵⁶

⁵³ Ibid.

⁵⁴ Barry L. Stiefel and Wells, *Preservation Education: Sharing Best Practices and Finding Common Ground*.

⁵⁵ Ibid

⁵⁶ Ibid. The editors assert that "Conservation/preservation education leaders cannot agree on the ontological and epistemological domains of the discipline and its core endeavors."

Authors who sought common ground contributed papers on their best practices.

Concluding the conference, Stiefel and Wells wrote: “Many of these issues have, at their core questions of identity and defining practice and research within the historic environment.”⁵⁷

Conclusions like that and the *Bending the Future: Fifty Ideas for the Next Fifty Years of Historic Preservation in the United States*⁵⁸ by Max Page and Marla Miller come from invited experts who contributed chapters used in this literature review. Their book for the NHPA’s fiftieth anniversary charted the future of preservation.

In addition, the commentators’ distinct vision for the future addressed related questions, including:

Who is a preservationist? What should be preserved? Why? How? What stories do we tell in preservation? How does preservation contribute to the financial, environmental, social, and cultural well-being of communities? And if the ‘arc of the moral universe...bends towards justice,’ how can preservation be a tool for achieving a more just society and world?”--The dissertation included their straightforward ideas making this project one of the steps in the right direction. Its objectives join in the effort for...conservation/preservation educators worldwide to more purposefully forging a future for historic environment education.⁵⁹

Part I.2 American Studies, Public History, and the Conservation of Historic Sites

Besides reading works of literature, the use of oral history and informal interviews informed these reviews. Several interviewers’ assertions, backed by the recent readings, indicate the priority in civil society for Historic Preservation remains lower than half a century ago. Federal leadership since 1966 required increases in professionalization by means necessary to

⁵⁷ Max Page and Miller, *Bending the Future : Fifty Ideas for the next Fifty Years of Historic Preservation in the United States*.

⁵⁸ Ibid.

⁵⁹ Ibid

educate, regulate, and incentivize the public and private sectors. Federal funding for historic preservation included line items passed through to states and local government preservation officers to implement the various sections of the 1966 NHPA laws. In addition, they were funding each state for the new mandates imposed by the federal requirements to educate, regulate, and incentivize from the Historic Preservation Fund, a line item in the NPS budget.⁶⁰

According to reports from several nationally affiliated preservation organizations, what became apparent at the fiftieth anniversary conference for the 1966 NHPA was a growing discouragement amongst the urban populations who have naturally changed over the half-century. Thus, what was once an enthusiastically supported Sixties social movement is no longer holding the interests of the following younger generations from the same socio-economic group.

In the sixties, the initial grassroots effort by inner-city groups took the lead from Jane Jacobs's book *Death and Life for Great American Cities*.⁶¹ Their demonstrations and lawful protests stopped some inner-city destruction and preceded the long-awaited federal response. The delays stemmed from the government, and the Highway Lobby was responsible for catalyzing the clear and present dangers to older neighborhoods. The urban renewal demolition and funding for the multi-billion-dollar roadway construction along new rights of way bypassing older rural towns and placing new cloverleaf intersections for commercially zoned land for joint development opportunities "made a lot of people rich," according to former MT Senator Baucus.

⁶⁰ The NPS line item for permanent funding programs appears in its annual Green Book and its levels go up and down with the Congressional appropriations. A formula is used for levels of funding for each state that would the staffing for the Federal and private sector review of compatibility with the Standards as set by the Secretary of the Interior. The same Historic Preservation Fund for the states allows a pass-through of a small amount to each Certified Local Government officer to be matched by the municipalities. States can also offer grants and projects can compete at both the state and federal level. Each new administration has their own thrusts or emphasis for the program objectives: Obama chose the underrepresented communities and Trump included Rural areas in that definition.

⁶¹ Jane Jacobs, *Death and Life of Great American Cities* (Vintage Press, 1961)

By 2003, Robert E. Stipe lamented, “for the public at large, HP is not as high a priority as we might wish.”⁶² Moreover, he admits it does not have the prestige of political clout as its progenitor, the NHPA of 1966,⁶³ which catapulted the movement forward and gave us the unified national system.⁶⁴

The NHPA elevated local historic sites by placing all of the 1930s listed National Historic Sites to a new National Register of Historic Places and the nationally significant designation of the National Historic Landmarks. These lists grew to over 95,000 listings, with one in almost all counties⁶⁵ because all places are important to communities to provide “orientation to the American people⁶⁶.”

Stipe’s answers to one of the most common questions follow: “Why should we care if cultural resources are not preserved?”

- The historic resources are all that links us physically to our past. The tangible artifacts can help answer who we are and how we are evolving and different from others.

⁶² Robert E. Robert E Stipe, ed., *A Richer Heritage Historic Preservation in the Twenty-First Century* (Chapel Hill: University of North Carolina Press, 2003).

⁶³ Authority: National Historic Preservation Act of 1966, as amended, 16 U.S.C. 470 *et seq.*, and E.O. 11593. Source: 46 FR 56187, Nov. 16, 1981, unless otherwise noted. NHPA authority is under [36CFR60](#)

⁶⁴ United States Conference of Mayors, United States, and National Trust for Historic Preservation in the United States, eds., *With Heritage so Rich*, Landmark Reprint Series (Washington, D.C: Preservation Press, 1983). It was the founding report sponsored by the Council of Mayors and mobilized by the special Committee on Historic Preservation. During the 1965 White House Conference on Natural Beauty held by Lady Bird Johnson and key members of Congress they resolved to see to the passage of the 1966 NHPA.

⁶⁵ “National Register of Historic Places,” *NPS*, 1966, <http://www.nps.gov/nr/>. The National Register List is now over 90,000 and consists of over 1.2 million places within districts or individual sites, buildings, structures, and objects significant in American history, architecture, archeology, engineering and culture)

⁶⁶ Robert E. Stipe, *A Richer Heritage Historic Preservation in the Twenty-First Century*. (Chapel Hill: University of North Carolina Press, 2003) His quotation from the 1986 ACHP report to the President and the Congress of the U.S. It recounted the first twenty years of the NHPA of 1966. P. 16-17

- Sites and structures that relate to “past events, era, movements, and people” have been of importance and can still appeal to someone’s emotional needs for nostalgia, ancestral and spiritual respect, patriotism, and as a fount for creative imaginings of the past.
- HP serves human and social purposes for society; it can go beyond the old rationales of patriotism, nostalgia, or elite intellectualisms and avoid irrelevance if it conserves the heritage of all people, thereby enhancing everyone’s quality of life.
- The heritage around us becomes part of us. Expectations are created, and their replacement should be forestalled.⁶⁷
- Historic Preservation and its place in American Studies have other economic benefits⁶⁸.

“Preservation projects can be profitable, and preservation policies do make sound fiscal sense,”⁶⁹ wrote Randall Mason in a 2005 Brookings Institute report. However, the rehab projects’ profitability varies and must be figured for each instance, and is part of HTC applications. Mason reported on several methods for consultants to use when addressing another critical question: Does Preservation pay? The economic modeling used for environmental issues is finding more use in historic preservation projects, and some are still used simply for advocacy purposes.

⁶⁷ “Federal Historic Rehabilitation Tax Credits” (Rutgers University, New Brunswick, N.J.: NPS TPS, n.d.). The Tax Codes stipulations for depreciation of buildings makes a life cycle greater than forty years doubtful. Most residential rentals change hands after less than 30 years and the cycle begins again. It takes fifty years before the property is usually considered eligible for consideration as a historic property by the NR programs. After two owners the nomination for NR listing may seem a detriment to appraised values as most systems would need substantial rehab. This was a motivator for passage of the 1976 Historic Tax Credits for substantial rehabs that are qualified to be done for NR properties. That law also eliminated the tax break for demolishing perfectly serviceable income producing buildings.

⁶⁸ Randall Mason, “Economic Benefits of Historic Preservation” (Washington, D.C: Brookings Institute, 2016), https://www.brookings.edu/wp-content/uploads/2016/06/20050926_preservation.pdf. https://www.brookings.edu/wp-content/uploads/2016/06/20050926_preservation.pdf. The Brookings Institute report *Economics and Historic preservation* “has important economic values and produces certain economic benefits for both private actors and the public at large.

⁶⁹ Randall Mason, “Economic Benefits of Historic Preservation”

The disappointing lagging interest by the public at large was also reported by the NTHP and the Advisory Council for Historic Preservation during a strategic planning research project using surveys of thousands of members. The lag in interest is a setback but is not new in the public realm. The lagging interest was also true of architects; according to Charles B. Hosmer, who wrote in 1965, “Architects should have been the most active professional group in the preservation movement, yet the contribution of individual architects and the AIA has been disappointing.”⁷⁰ Hosmer takes the reader back to the 1869 Convention, when then President of the AIA, Richard Upjohn⁷³ urged the “talented members of the Academy of Design to make careful studies of the old houses yet remaining.” He warned that these houses would be “buried in oblivion in the course of another century unless faithful records are kept of them by all hands.”⁷¹ Upjohn also spoke of the quality of these old houses, “quaint, regard the law of harmony between a building and its surroundings better than do the buildings of the present-day?”⁷²

Because of the rapidly changing times, “more concerns need to be addressed to encompass the cultural context surrounding the future of these ancient human artifacts, historic and prehistoric sites, landscapes, and buildings.”⁷³

The Advisory Council for Historic Preservation was formed to advise the president about the federal role to be played after the passage of NHPA. They were also there to hear the

⁷⁰Max Page and Miller, *Bending the Future : Fifty Ideas for the next Fifty Years of Historic Preservation in the United States*.

⁷¹ Richard Upjohn, “The Colonial Architecture of New York and the New England States,” *Proceedings of the American Institute of Architects*, Proceedings of the 3rd Convention American Institute of Architects, Third Convention (1869): p.175-179.

⁷² Richard Upjohn, p. 47–49 Reynolds, Marcus T. “The Colonial Buildings of Renselaerwyck.” *Architectural Record*, 1895.

⁷³ Robert E. Stipe, *A Richer Heritage Historic Preservation in the Twenty-First Century*. (Chapel Hill: University of North Carolina Press, 2003). Introduction by Diane Lea. p.10

people's protests. At the fiftieth anniversary of their formation, the ACHP reported that more work still needs to be done. Dr. Richard Wagner, past director of the Goucher College preservation program, said that these five "drivers primarily shaped the NHPA and its policies and programs:" (1) demographics, (2) the natural environment, (3) technology, (4) economics, and (5) the education environment of mid-20th century America. He notes that significant changes in those drivers will occur over the next fifty years, which will have a significant effect on the needs of the national historic preservation program." Such as the following challenges and opportunities:

- Challenges: Developing public and political support; promoting inclusiveness; improving preservation processes and systems.
- Opportunities: Democratizing preservation; celebrating diversity; furthering collaboration; enhancing appreciation for heritage through education; rethinking established preservation processes and systems.

Part I.3 Cultural Homogeneity Lacks Diversity, and the Rural in Historic Preservation is Missing.

In earlier reports, Stipe's concerns of a similar nature that too much standardization can freeze legislation and programs are now being echoed in the new millennium. These concerns are about the preservation movement's chance to evolve. He felt that problems of cultural homogenization presented a challenge.⁷⁴ Stipe wrote, "to demonstrate the relationship between material culture—a building, a group of buildings, a landscape, a structure, an archaeological

⁷⁴ Robert E. Ibid. (Chapel Hill: University of North Carolina Press, 2003). Introduction by Diane Lea. p.10.

site—with the larger set of intangible social and environmental values we seek to portray and preserve”⁷⁵ is the challenge.

Despite this challenge, the government has been reducing its role in historic preservation, adds the former NPS historian Antoinette Lee: “If there is one thing we have learned over the years about the long-term preservation of cultural resources, it is this: The Park Service cannot do it alone.”⁷⁶ She asserted that “Architectural historians give you the information; the neighborhoods give you the passion. The friends of parks and preservation for that matter...are our major weapon against local zoning changes that could otherwise destroy the value of historical settings.”

“The role of government is limited by the awareness and commitment of the citizen that it represents,” stated a nonprofit organization aligned with the national parks. Laura Beaty wrote that critical point of view for the National Parks and Conservation Association (NPCA).⁷⁷ The NPCA helps the NPS in venues where government employees cannot act.

“Educating and involving the public may, therefore, be one of the most important single tasks that lies ahead for those of us who are willing to make the effort.”⁷⁸ This is the central point to keep in mind as it has propelled the work of this multi-year dissertation project. It remains a focal point drawn from the three primary problem sources chosen in Chapter One. It is

⁷⁵ Ibid. p. 463

⁷⁶ Norman Tyler, Ted Ligibel, and Ilene R Tyler, *Historic Preservation, An Introduction to Its History, Principles, and Practice*, second edition (New York, NY: W. W. Norton & Co., 2009).

Lee, Antoinette, Chapter Two, pg. 59.

⁷⁷ The National Parks Conservation Association is the only independent, nonpartisan membership organization devoted exclusively to advocacy on behalf of the National Parks System. Its mission is “to protect and enhance America’s National Park System for present and future generations.” <http://www.npca.org/>

⁷⁸ Laura Beaty, “How Well Is the National Park Service Managing Its Cultural Resources: The NPCA Point of View,” *The Public Historian*, Univ. of California Press, no. Vol. 9 No. 2. pp. 125-134. NCPH (Spring 1987).

a central problem for the work of this dissertation, which is an ‘aware civil society.’ The public’s increased awareness, as a committed citizenry, can be the change in attitudes and behavior through continuing education so they can improve their competence needed for conserving their heritage.

The opportunity to increase one’s competency by accessing new knowledge and the change in attitude that allows new behaviors can overcome the limitations of government, the authority vs. agency problem and take a step in the right direction in countering neoliberalism’s market price-driven algorithms.

A scan of the government’s continued abilities to lead the preservation movement despite the budget cuts and decreased staff, and lack of management succession indicated a widening gap. Laura Beaty’s exhortation for concerned volunteers to fill this gap has been repeated within the online intervention for the research phase of this dissertation project. Several officials, the Secretary of the Interior, and NPS directors expressed a similar thought at the centennial of the NPS and the anniversary of the passing of the NHPA in 2016. It is a repeated theme in the NPCA publications and the National Trust’s reports on the Eleven Most Threatened Historic Places annual lists.⁷⁹

In 1976, again in 1981 and 1986, Congress introduced significant changes in the tax codes that allowed the credit for the substantial rehabilitation of a historic property. Called by some insiders simply as the Tax Act, the Historic Tax Credit (HTC) program rallied the private sector that began the change needed to overcome the shrinking role of the federal government.

⁷⁹ The non-governmental status of the NPCA was the reason the NPCA formed in 1919 by Stephen Mather, then Director of the National Park Service. Since then, there are many Associations that work for the sake of the parks throughout the system including the formerly governmentally funded National Trust for Historic Preservation.

Two decades after the original NHPA's passage, the HTC has been a part of preservation activities in all states and tribal lands. By incentivizing the private sector to save historic properties as they reuse them for future income production, HTC has had an average of 1200 projects per year. The preeminent preservation program of the federal Historic Preservation Fund has been the HTC, and its leading promoters are consultants and the National Trust. The Trust started a nonprofit branch to aid promoters of the HTC. They have grown the interest while budget cuts took their toll on federal and state staff engaged in the HTC. The Trust or NTHP has had to promote its role in the everyday lives of preservationists and others through a massive online survey. Their goal was to be more relevant to a more diverse audience, and they found out quite a bit that helped my research of marketing:

The NTHP study of millennials' interest in the concept of historic preservation indicated they were almost unanimous in their embrace of H.P. out of the diverse cross-section of the population surveyed. The millennials see H.P. as a means to save the places that define us as Americans (54%).⁸⁰ By saving places, H.P. can be part of actions for "conserving land and habitat and avoiding carbon emissions (helping the planet). Since millennials have discretionary cash for entertainment and dining out, the 52% who responded were more than twice as likely to prefer shopping in historic downtowns and places with historic appeal over malls and commercial districts recently planned and constructed. More than half viewed HP as a way to protect the unique cultural wealth and diversity of communities.

After the study, the National Trust inclusion goals were updated: The new initiative will be implemented for what they called a 'people-centered approach,' a new preservation movement that "hears, understands and honors the full diversity of the ever-evolving American story."⁸¹ This direction from the people first was promoted by university programs that offer

⁸⁰Timothy J. McClimon, "Historic Preservation Movement: Connecting People With Places," September 18, 2018.

⁸¹ Stephanie Meeks, "Preservation for People: A Vision for the Future" (NTHP, n.d.), <https://forum.savingplaces.org/blogs/stephanie-k-meeks/2017/05/18/presenting-preservation-for-people-a-vision-for-the-future>.

their preservation students real-world clients and a semester internship. The preservation movement going forward will be rooted in people and not places alone, said the Trust (and others in the academy). The former president of the Trust, Stephanie Meeks, said, “it can be more inclusive in the identification, understanding, and protection of historic places.”⁸²

The Trust hopes to emulate work by innovative university faculty, whose outreach work will be discussed later in the dissertation. The assertions used in the advocacy messaging before legislators and the public include people’s welfare and livelihood; “historic places are essential to physical and psychological health; to fostering a creative, fair, sustainable and entrepreneurial economy; and to encouraging tolerance and social cohesion.” This assessment was based on studies and backed by several economists, including the Brookings Institute. Stephanie Meeks,⁸³ the president of the National Trust, summed up its new efforts to widen the base of support while bridging the gaps dividing society.

We can’t possibly navigate these challenges wisely without some perspective and some help from the past. With so many forces dividing us, preservation is one of the few things that brings us together—as a nation, as communities and as people.

Many early proponents of historic preservation in the United States rested their cases on similar factors unifying the people toward an orientation symbolized by the physical remnants of the past. Iconic places are like extensions of the main pillars of civil society that people in urban areas pass by in their daily activities, such as courthouses, government buildings, churches, and schools. The list may include civil society investments in cultural institutions such as museums,

⁸² Meeks, Stephanie. “Preservation for People: A Vision for the Future.” NTHP, n.d.
<https://forum.savingplaces.org/blogs/stephanie-k-meeks/2017/05/18/presenting-preservation-for-people-a-vision-for-the-future>.

⁸³ Ibid

opera houses, and landscaped botanical gardens in more affluent communities. All are part of the public domain or open to the public as spaces for communal use, unlike the private properties of residential or commercial real estate.

As far as the rural areas conservation topics covered in the literature, the architect Benjamin Flowers summed it up for the *American Studies Quarterly* article: “An overlooked aspect of historic preservation is the movement for the preservation or conservation of rural areas.”⁸⁴ Due to the sparsely populated rural areas, historic preservation cases are missing from the literature, prompting his call for more research. His call was for “more focus on vernacular architecture, on environmental considerations...retention of the “ agricultural economy.”⁸⁵ Several scholars from diverse fields had made the same point. Many are decrying the loss of arable land for subdivisions. Even the making of the traditional adobe in the Southwest is a dubious use of arable soil. Pliny Fisk, a professor, founder, and co-director of the Center for Maximum Potential Building Systems near Austin invented a substitute using fly ash to make the adobes.

Furthermore, an informal interview with a professor of Agricultural Education and another from Architecture, both from rural state universities, revealed that they never heard of federal aid for historic agricultural structures. After spending decades preparing the next generations of Extension Agents and Secondary School Ag Teachers, an act of omission like this

⁸⁴ Benjamin Flowers, “Historic Preservation.” In *Encyclopedia of American Studies*. (Baltimore, MD: Johns Hopkins University Press, 2018). <http://eas-ref.press.jhu.edu/view?aid=8> (.

⁸⁵ K. Ross Toole, at University of Montana, once called for more scholarship for the rural parts of Montana. I have interjected the thoughts of some of those who responded in their time, i.e Wallace Stegner, “His take on the West was realism, and he wrote about the success of cooperation rather than “rugged individualism” according to Ryder W. Miller’ review of the Fradkin biography of Stegner. Miller adds other writers who were Stegner’s students at Stanford or influenced by him who in effect took up Toole’s challenge, including: Ivan Doig, Rick Bass, Terry Tempest Williams Larry McMurtry and Wendell Berry who I feature in my later chapters. Others associated with Montana State University includes its former president Michael Malone, Mary Murphy and my committee member, historical geographer, William Wyckoff.

can be costly as they are, in essence, lost benefits for a sector of the economy that is mainly in the hands of family farmers. The timely transmission of this knowledge to increase students' competencies about federal grants and tax credits could make these graduates agents of change back in their small farming and ranching communities.

Having more arrows in one's quiver to fight to keep the family farm or ranch sustainable by utilizing tax credits for rehab of income-producing agriculture structures seems vital.⁸⁶ It could save those private small family farm operators millions of dollars and prevent lost opportunities. Instead of seeing the following image dotting the rural landscape—due to lack of alternatives to keep the ancestral farm buildings from becoming moldering ruins—there could be a more proactive attitude toward using federal programs that can change the default behaviors away from benign neglect.

⁸⁶ The Extension Service has field agents in many counties of rural America, and they are served by Community Development Specialists with their finger on the pulse of the socio-economic as well as the global political issues affecting stock and farm producers. University outreach as authorized by the Morrill Act of 1862 has been channeled through the Extension agents as well as pure research by various departments on campuses. Little has been done to bridge the gaps between those concerned with historic preservation and community development and for that matter agricultural education curriculum. It is a natural fit to have another tool to help save the family farm. One professor of Ag Ed was delighted to learn that the Historic Tax Credits can be applied to historic agricultural structures. A past Extension agent statewide coordinator was dubious about adding more to the Extension Agents already full list of responsibilities. Change ---including Climate Change---is looked upon with suspicion in many rural areas.



Figure 9. A Barn Moldering Towards Ruin. An All Too Familiar Sight.

There is rare unanimity that the field of preservation does have to change with the times as it devolves from an urban elitist social movement or one of patriotic zeal around the long-gone American Bicentennial celebrations. As the field grew from the reluctant philanthropy to save Mount Vernon and other Presidential homes to a defensible grassroots effort to stop bulldozing inner-city icons and ethnic neighborhoods for dubious progress, it became federalized. Besides the occasional resurgence of patriotism around an anniversary, the preservation regulating efforts took on bureaucratic professionalism dealing with commercial real estate developers, attorneys, and counteracting civil protestors. The social movement that bound diverse populations toward preserving neighborhoods grew until threatened by losing contact with the public it serves. Preservation activity, which “often reveals as much about the cultural and social conditions of the present as of the past,” needs to reward voluntarism. In an article penned by former MSU architectural professor Kingston Heath for *The Journal of American Folklore*, he called for a

more “humanistic approach to historic preservation.”⁸⁷ In Heath’s words, “buildings and settings, alone, do not make ‘place’—people, in their interrelationship with the natural and built environment, make place.”⁸⁸ This perspective is central to the effective integration of folklore and historic preservation:

perhaps one of the most exciting aspects of the Place Matters program is the way it circumvents National Register [of Historic Places] criteria as the only means of commemoration by fostering, instead, a grassroots ‘landmarking’ program that offers an ‘insider’s view’ of local relevance.⁸⁹

The founder of the seminal *Old House Journal* wrote, “Preservationists are Un-American; the fact is that preservation goes against the basic historical thrust that built America into a world power,” said Clem Labine,⁹⁰ Often preservationists feel outside the mainstream and seek examples. Labine adds, “So, where do preservationists fit into this scheme of things?”

Perhaps a revival of the original passion for a social movement is what he was recommending when he wrote: “we represent the cutting edge of a true cultural revolution, a revolution generating new perceptions that will have a dramatic impact on America’s way of thinking in the next 50 years. We are cleaning up after society’s litterbugs!”⁹¹

⁸⁷ Sommers, Laurie Kay, “Introduction: The Place of Folklore in Historic Preservation,” *The Journal of American Folklore* 132, no. 526 (2019): 355–58.: 355. <https://doi.org/10.5406/jamerfolk.132.526.0355>.

⁸⁸ Ibid Discussant Kingston Heath, Comments presented at the American Folklore Society Annual Meeting, New Orleans, October 2012 . White Paper issued in 2013. Updated November 2016 issue. <https://www.afsnet.org/page/FHPPolicyPaper>

⁸⁹ Ibid

⁹⁰ Clem Labine, “*Preservationists Are Un-American*,” 1979. quoted on pg.12 *Historic Preservation, An Introduction to its History, Principles, and Practice*, second edition, Norman Tyler, Ligibel, Ted. J. Ilene R. Tyler, (W. W. Norton & Co. NYC 2009).

⁹¹ Clem Labine, “*Preservationists Are Un-American*,” 1979.

Part II Pluralism

Retaining the historic architecture of past generations amidst the newer populations in burgeoning urban life or even rural communities is a signifier from those people from the past and most likely of a different origin story. Pluralism in political philosophy holds that many people, no matter their beliefs, backgrounds, and lifestyles, can be active participants in a more open society. There is a possibility of deterring the growth of a society-of-control that oppressively acts against its citizens if the populace shared equally in the political process and cultural life, as would ideally occur in a pluralistic society. The characteristics of a beneficent pluralism would have no voting restrictions for one, equal pay for equal work amongst all equal workers regardless of their differences, such as being a female or a person using English as their second language. Those much-touted Four Freedoms⁹² from before WW II would be a signifier of the creed, and the United Nations Human Rights Bill would be its constitution. The haves' and have-nots' access to those rights would be equal regardless of ability to pay. Participation so one's voice could be heard would be the paramount concern of public authorities since, after all, their authority comes from the people. These ideals were debated within the pragmatic pluralistic theories of William James and John Dewey to define what moral decision to make to be as good as possible when there are conflicting demands. Every opportunity cost dilemma⁹³ is an example

⁹² The Four Freedoms are the goals expressed by FDR before WW II. The first of the four freedoms was the freedom of Speech. The second he listed was the freedom to Worship in one's own way. The third was the freedom from Want and Fear.

⁹³ R. Burke, R. Johnson, and Anthony J. Onwuegbuzie, eds., "Mixed Methods Research: A Research Paradigm Whose Time Has Come," *Educational Researcher*, American Educational Research Association, Vol. 33, no. 7 (October 2004): 14–26, <http://www.jstor.org/stable/3700093>. William James: accepted the core principles of opportunity costs: 'that choosing to satisfy one demand leaves another unfilled'. He explained: "There is always a pinch between the ideal and the actual which can only be got through by leaving part of the ideal behind. There is hardly a good which we can imagine except as competing for the possession of the same bit of space and time with some other imagined good. . . . Some part of the ideal must be butchered" Pragmatism as the philosophical partner for mixed method research, citing the pragmatist philosophers William James and John Dewey who believed in settling metaphysical disputes by tracing the practical consequences.

of what must go on when a property owner response to save or not save a Main Street historic building damaged by a gas explosion: ‘it did not pencil out’ has been the shorthand for having chosen another opportunity rather than the one facing him—a damaged historic building. Many financial factors were explained, such as insurance does not cover bringing the old structure up to current codes; therefore, money out of pocket and the engineers and fire marshal determined without testing that bricks exposed to fire as hot and for as long as the west wall were no longer structurally sound (although fire is how the clay in bricks gets its initial strengths, stiffness and if they remain in compression in the wall they are expected to fail a bending test for instance). Lastly, it turns out the dirt under the building sells for as much or more than the building that is no longer salvageable, and the insurance company already paid for his losses.

So, the city preservation officer required the mitigation to include a complete historical and archaeological building history, measured drawings before issuing a demolition permit. The site sat empty for a decade without a buyer until recently. At the time of the blast, the tenants were in residence and survived unscathed due to the protection of the thick masonry walls that previously withstood a couple of damaging earthquakes. Unfortunately, those tenants no longer had a place to live, and the shopkeeper was forced to move. The gaping hole in the street front of Main Street was partially filled by a plywood fence and community-painted murals that faded over the next decade.

What was the best or least bad that came out of the decision? If it were up to James’ pragmatism, then each stakeholder would have a different answer. Downtown apartments are rare, and the tenants lost out on their centrally located pad for all time. As far as I could tell, only

the price mattered in the end. Having a fluid moral compass is a post-modern characteristic of stakeholder management by organizations.

Moreover, according to James, everyone has their universe of morality and ways to weigh opportunity costs, and what is good for one is good enough since there is no longer an arbiter above in this pragmatic philosophy. But what about a pluralistic moral dilemma? A liberal pluralism, according to Rawls, is almost paradoxical:

A democratic society is not and cannot be a community, whereby a community, I mean a body of persons united in affirming the same comprehensive, or partially comprehensive, doctrine. The fact of reasonable pluralism which characterizes a society with free institutions makes this impossible. This is the fact of profound and irreconcilable differences in citizens' reasonable comprehensive religious and philosophical conceptions of the world and their views of the moral and aesthetic values to be sought in human life. The reality of pluralism makes a simple homogenous community impossible and requires a different plan of social organization than a monopoly of a unified moral code.⁹⁴

An appreciation of tangible artifacts has to be learned by successive generations and conserved for the future. Therefore, a discerning aware civil society that is willing to understand the significance of a place can best decide whether it should continue to serve a purpose for the present. Unfortunately, instead of that mindfulness, we see in today's neoliberalism the primacy of single large property owners who can politically manipulate the system to one purpose: profit-making without caring for the community.

Pragmatism holds that the moral life for an individual involves fulfilling their unique individual desires. Pluralism extends that search to the larger social sphere and describes a set of social processes that provide the space and institutional context where individuals living with one another can pursue their own vision of

⁹⁴ John Rawls, "The Idea of Public Reason Revisited," *The University of Chicago Law Review* 64, no. 3 (1997): 765–807, doi:10.2307/1600311.

____ John Rawls, *Political Liberalism*, revised edition (New York: Columbia University Press, 1996).

the morally good life...create social structures and processes that encourage human flourishing.⁹⁵

During the darkest times of the Great Depression, Frank Lloyd Wright had no commissions of note and began to write in a more philosophical mode for the recovery of the American ideals. He embraced many of the thoughts from the nineteenth-century theorists and pastoral twists to the solutions of better city-making. The ideas were kept alive in each of his major and minor projects as exemplars of what the overarching philosophy known as Broadacre City had been conceived during the thirties.⁹⁶ The renaming of Americans as Usonians and the community making Broadacre was his best advice to a country laid low by the failures of capitalism after the Crash in 1929 and the long devastation of the economy throughout the next decade. His disdain was apparent:

The “rugged individualism” that now captains our enterprises and becomes the “capitalist” is entirely foreign to this ideal of individuality. The actual difference between such “ism” and true individuality is the difference between selfishness and selfhood; the difference between sentiment and sentimentality...such individual “ism,” literally “every man for himself and the devil for the hind-most,” aggravated by the misuse of vicarious power has got native individuality into bad repute. Like the abuse of any good thing, it is likely to bring on reactionary consequences. Signs of this reaction are not wanting⁹⁷

⁹⁵Paul C. Godfrey and Ben William Lewis. “Pragmatism and Pluralism: A Moral Foundation for Stakeholder Theory in the 21st Century,” (Brigham Young University, 2018).

⁹⁶ Jennifer Gray, “Reading Broadacre,” *Frank Lloyd Wright Quarterly, Perspective*, Winter 2018.

Barry Bergdoll, Jennifer Gray, and Frank Lloyd Wright, *Frank Lloyd Wright: Unpacking the Archive* (New York, New York: The Museum of Modern Art, 2017).

⁹⁷ Frank Lloyd Wright, *The Living City* (New York: New American Library, 1970). Wright’s *Disappearing City* and *Broadacre City* were the two original books were written during the Thirties that were later republished as the *Living City*. The *Disappearing City* polemics about the death of American cities and his vision for a new Usonian future led to *Broadacre City*. The second book showed off a design concept in book form called *Broadacre City*. Thirty years later Jane Jacobs would argue in her *Death and Life of Great American Cities* that there were still vibrant neighborhoods for the pluralistic American dream to coexist in those urban places. Wright’s dreams were part of the Garden City movement from the Nineteenth Century started with Ebenezer Howard. The United Kingdom’s Garden City movement would have moved factory workers and agrarians together and out of the city to populate what is now known today as exurbia. More recently the proponents of New Urbanism have caught the eye of corporate media giant Disney and they developed Seaside and Celebration for those seeking small town Americana again. Those who became their new town dwellers are mostly homogenous upper middle income and without much diversity of home styles or minority occupants for that matter. This is unlike the New Town in Town period of suburbanization that was more integrated in towns like Columbia, MD and to lesser degree Reston, VA.

He felt neoliberalism dynamics dominated and damaged America, and he wanted Usonians (his name for Americans) to embrace his ideals for the recovery from the Great Depression. The marketplace had converted everyone into a 'rut' like life and followed closely those writings of neoliberalism that grew out of the laissez fair at the fin de siècle in America. Of course, western Europeans and American economists and political strategists feared the revolutionary spirit born out of the Russians deposing the czarist regimes a decade before. For Wright, communism was another rut to be avoided, yet it was ironic that he eschewed the rugged individualist myth considering his penchant for allowing the artist to live their larger-than-life lifestyle and reflected in their work. He intended Broadacres's way of life to allow for individuals to flourish and everyone to be a more active citizen in all regards, while free to be self-sufficient and caring for their family and community. He intended to do away with the commuter lifestyle that created the ruts that workers were trapped in every day. Wright's workplace was the studio at his home, never a commuter.

Unfortunately, Wright's point of view about American cities was for relegating them to the trash heap of civilization during those depression years, and he wanted nothing more to do with their obsolete older buildings. That was apparent in his corpus of designs that pushed a new organic architecture that rises from the ground up respectfully and symbiotically and without regard for the contextual surroundings. Many superstar architects follow his lead with their brand of iconic architecture as signature buildings that are one of a kind for their corporate clients who desire distinctive designs to match their inflated egotism and business ambitions. Wright worked for these scions of industry, yet he derided the failing capitalist system after the stock market crash and the ensuing Great Depression. His complaints about innovation lacking in the two

World's Fairs in Chicago had been voiced before the Depression-era canceled his commissions for most of the Thirties.⁹⁸ He, like other rising stars, resorted to writing instead of paying commissions for new design projects. His thought project was a visionary one that saw the new Broadacre City occupied by Usonians and would disrupt the corporate sameness in architectural expression and city planning practices. He blamed the lack of imaginative, organic architecture on the capitalist economic system that was no better than the rigid style of the communist or fascist states in Europe. His new lifestyle for Usonians would not require the residents to stay in their commuter ruts. The Broadacre vision would free them to live a life as an individual, with an acre for gardening and self-sufficiency, rather than as the conformist. Wright could never be accused of conformism himself. Biographers said all of his work after the Thirties was done as expressions of the Broadacre vision for the Usonians, his name for Americans.

⁹⁸ Robert W. Rydell et al., eds., *Designing Tomorrow: America's World's Fairs of the 1930s* (New Haven: Yale University Press, 2010).

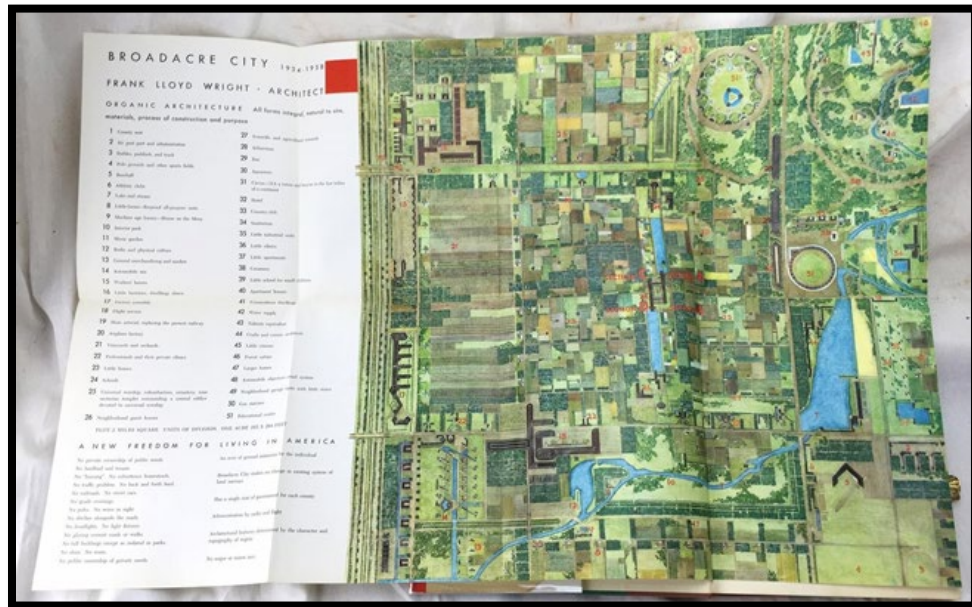


Figure 10. Fold Out Site Plan and Wrights List in the *Living City Book*, Published in 1958

II.1 Public Memory and the Sense of Place

Each generation can mitigate and help avoid the apathy that leads to benign neglect or outright destruction; to do so means each needs to re-transmit the public memory. In doing so, the sense of place can be re-presented in the case of the built environment. In fact, in the NHPA and its corresponding EO 11593 from 1971, those historic places on the National Register were supposed to be re-inventoried and assessed every ten years by the federal agency responsible for those assets of the public domain. Private property placed on the register was not subject to the same revisits to update the data kept with the NR listing. This aspect of the NHPA created a need for stewardship by land management agencies of the federal government, including the Defense Department holdings. These revisiting efforts were not funded per se, but the agencies were expected to budget for any cyclic maintenance needs of those listed properties, such as reroofing, repainting, and maintaining the landscape by regrading if necessary.

These preventative preservation actions were meant to keep the historic properties close to stasis. If funded, then preserving those qualities that made the building or landscape eligible for listing on the NR would be feasible. Without sufficient funding, as is the case, all of the time, priorities must be established, and a maintenance backlog created. However, if an agency waits too long, then due to the lack of its weathertight exterior envelope, the eventual loss of structural integrity would be a dereliction of the stewardship duty entrusted to those federal land managers.

The taxpayers and their elected officials are tacitly allowing the people's estate to be poorly stewarded at the federal level despite best intentions and the diligence of the land management agency. In the private sector, the owner of a historic property is expected to fund the same preservation maintenance cyclical needs of their buildings and grounds. Without the necessary maintenance, the threats to the building's structure could make its collapse imminent, and if there were a catastrophic loss of integrity, a proactive state historic preservation officer might intervene. Usually, intervention occurs at the local level by those in neighborhoods complaining about the danger or eyesore in their midst. If the owner does not comply, the building department may use its police powers of code enforcement to make emergency stabilization efforts, then pass the expense onto the owner. At the extreme, the State may de-list the property from the historic registers due to the loss of integrity.

The adverse effects to cultural resources by the neglect described above allow community participation in what otherwise is an owner-to-state relationship. The SHPO must review and comment on the planned or unplanned obsolescence of cultural resources within federal lands in

federal land management. That comes under a review authority called the Section 106⁹⁹ procedures of the NHPA legislative language. The SHPO can involve the public in the review. For traditional tribal entities, consultations are required. In addition, local planning boards and Certified Local Governments funded by the Historic Preservation Fund can weigh into the SHPO or Federal Technical Preservation Services branch of the NPS for the private sector properties.

State and federal archives document these interactions for the NR listings and casework brought to the Keeper of the National Register and the Advisory Council for Historic Preservation. Searching the literature for aspects of community involvement enabled an examination of quite a few cases, and some are highlighted, and the points raised informed the dissertation's intervention and research.

Standard tools of community planners and the social sciences were used in an ethnographic and interactive case in Central Colorado. The community was found in exurbia, revealing the potential for newly formed social interactions between disparate socio-economic groups and despite the fragmentation of land ownership. In a Central Colorado exurban area, the old-timers shared in mutually excluding newcomers. Not including locals was typical as well. Extension agents observed the process between the long-standing lifestyle of ranchers and farmers and city folks fleeing to the exurban area. Using cameras helped in beginning the strategic planning search for commonalities. Interactive facilitated meetings found one aspect above all discussed that would be most important: safety from wildfires. Together they could form action plans to reduce the perceived threat. The community decided to reuse an old, vacated

⁹⁹ Section 106 of the National Historic Preservation Act mandates federal agencies undergo a review process for all federally funded and permitted projects that will impact sites listed on, or eligible for listing on, the National Register of Historic Places. www.nps.org/

schoolhouse for its new firefighting cache.¹⁰⁰ Photographic documentation of what each person valued in their neck of the woods helped break the ice between newcomers and old-timers.

For Montanans engaged in another case of community planning, the descriptions of place and place attachment helped committees working together for shared visions and mission statements for the future of their location-specific community assets. These efforts to find common ground arose from a process called community strategic visioning (CSV).¹⁰¹ There was an interaction between facilitators and six communities promoting reflection and communication of positive views of their shared common ground. Rather than find a common threat like wildfire, the townspeople, as participants from a deindustrialized community in Montana, were asked to focus on shared assets and ways to enhance existing resources.

“The facilitated activities brought out the most significant qualities of place attachment that appeared prominently in the community vision statements.”¹⁰² Other examples researched include using a method of community strategic planning called Appreciative Inquiry for strategic planning using the 4-D approach of the Cycle: (1) Discovery, (2) Dream, (3) Design, and (4) Destiny. Other strategic planning and evaluation literature explained another method called SWOT. It stands for strengths, weaknesses, opportunities, and threats for project planning. Readings in the SMART techniques are important when setting outcomes; it is a mnemonic giving criteria to guide objectives, such as project management, employee performance management, and personal development. The letters S and M generally

¹⁰⁰ Soren C. Larsen, et al ed., “Place Perception and Social Interaction on an Exurban Landscape in Central Colorado”, *Geography* 59 (November 2007).

¹⁰¹ Paul Lachapelle, Eric Austin, and Daniel Clark. “2010 Community Strategic Visioning as a Method to, Define and Address Poverty: An Analysis from Select Rural Montana Communities.” Feb.’10 Volume 48 Number 1.

¹⁰² Ibid

mean specific and measurable. Possibly the most common version has the remaining letters referring to achievable (or attainable), relevant, and time-bound.

Garnering the opinions of community members from remote, sparsely populated areas could be aided by the technology enhancements used by telemedicine and funded by USDA grants to connect these areas to internet access. In this way, everyone could vote on alternatives in planning or social service survey. However, so far, these e-participation methods have not replaced county courthouse public hearings even after the experiences with virtual meetings during the pandemic of 2020. “Survey research shows that e-governance initiatives are still predominately noninteractive and nondeliberative.”¹⁰³

The authors argue that because “e-democracy initiatives are not at the forefront of e-governance, there will not be a transformational change in the near future.”¹⁰⁴ However, in some welfare programs, the street-level bureaucrat who had some discretion to interpret the law has been replaced by the system-level bureaucracy that removes all discretion since it is programmed to do so by the remote disinterested IT-system designer.

The Environmental Systems Research Institute (ESRI) has made it possible for everyone, not just academics or planners, to be mapmakers for the assets in their communities. The locals became mapmakers and storytellers for their forgotten or suppressed memories due to the influence of the dominant majority. The nonprofit StoryCorps, ESRI’s StoryMaps, now have a federal museum exemplar at the Library of Congress’ online ‘Story Maps.’ of their inhouse

¹⁰³ Christopher G. Reddick, *Public Administration and Information Technology* (Burlington, MA: Jones & Bartlett Learning, 2012).

¹⁰⁴ Ibid. ICT is one of the driving forces behind transformation. Window clerks are being replaced by Web Sites and advanced information expert systems are taking over the role of case managers and adjudicating officers. The street level bureaucracy has been replaced by a system-level bureaucracy, as per Bovens and Zouridid, 2002.

collections.¹⁰⁵ These interactive technologies have inspired everyday people to add narrative texts, multimedia content, and images to tell the story of their community or family lore at their local venues of history museums. Now anyone with, computer access can see galleries of photos attached to a Google Map location search to help tourists plan a trip, bring new business to a restaurant, or enhance vacation recollections by merely using one's smartphone camera and its built-in GPS location finding app. Applications are employed to make more purposeful historic tour maps or any number of specific uses. A collection of points of interest for a subaltern lifestyle that is safe in counter-public places creates a chat room for in-depth narratives. Archiving contributed cognitive maps by all manner of local society members makes a historic scrapbook of memories. On the other hand, counter-mapping protests by dissenters sharing their opinions form a history of a place used in real-world daily life activities.¹⁰⁶

J.B. Jackson's work on the 'Sense of Place'¹⁰⁷ provides insight into common ground, "for that is what distinguishes vernacular space from territorial space: it belongs to us." For those within vernacular space, they do not own these spaces, but traditional customs and common sense guide their society to meet its daily needs. These customs can be inclusive or exclusionary depending on the local cultural geography, social taboos, mores, and statutes regulating public domain uses. A lot can be learned from the everyday uses and traces left by consumptive use of commonly held public space. Some overt signs limit who can use a space, drink from public fountains or sit on benches. These signs also signify underlying attitudes of racism, or they can

¹⁰⁵ Nonprofit Story Corps: <https://storycorps.org/> ESRI is at www.esri.com for StoryMaps; and the Library of Congress is at <https://www.loc.gov/rr/geogmap/storymaps.html>

¹⁰⁶ "ESRI," n.d., <https://www.esri.com>. Environmental Systems Research Institute is an international supplier of geographic information system software, web GIS and geodatabase management applications. <https://storymaps-classic.arcgis.com/en/>

¹⁰⁷ J.B. Jackson, *A Sense of Place, a Sense of Time* (New Haven: Yale Univ. Press, 1994).

be celebratory of significant events and persons who once tread on the same ground as us. There is a body of work using ethnographic assessments by Setha Low and others from my alma mater, the City University of New York, built upon the earliest environmental psychology procedures. Her book *Spatializing Culture: The Ethnography of Space and Place* shows how we can bridge the gap between public agencies and commercial establishments and how humans physically interact with their shared environment.¹⁰⁸ Their observations can help make places defensible against crime or more inviting for families to balance the user profile in public parks, for instance. The procedures are described further in Chapter Four: Methods.

II.2 Underrepresented Populations

Historical studies have only “scratched the surface,” according to Gendzel, regarding collective memory of places.¹⁰⁹ “Historical scholarship shares little in common with popular notions of the past.” Commemoration of past events or historical figures by the state or civil society “represents only the starting point” for the study of public memory.¹¹⁰ The literature review for this section included the multimedia coverage of current events around the use of public space, the police power of the state, and the domination of the many by the few through illegal lethal force and legal injustices.

¹⁰⁸ Jeanne Marie Teutonico and Frank Matero, Editors *Managing Change, Sustainable Programs to the Conservation of the Built Environment*; Phila. Pa. / Los Angeles: UPenn and Getty Conservation Institute, 2001. Setha Low essay on Rapid Ethnographic Assessment Procedures for national parks is in this volume also see Setha Low, *Spatializing Culture: The Ethnography of Space and Place* (London and New York; Routledge., 2017).

¹⁰⁹ Glen Gendzel, “Public Memory,” in *Encyclopedia of American Studies*, 2001, vol 3., Available at: http://works.bepress.com/glen_gendzel/11/, 2001. Available at: http://works.bepress.com/glen_gendzel/11/.

¹¹⁰ Glen Gendzel, “Public Memory,” in *Encyclopedia of American Studies*, 2001, vol 3., Available at: http://works.bepress.com/glen_gendzel/11/, 2001

All too often, the victors get to tell mythic sanitized commemorative stories that perpetuate their dominant hegemonic narrowed story about what is always a disputed past. Lately, there has been a resurgence of the past divisiveness focusing on ‘America’s post-Civil War Reconstruction period statuary. The late 19th century monuments of dead Confederate generals act as a placeholder marking what Gendzel called a ‘starting point’ for public memory.¹¹¹ The space it occupies while acting as a ‘sign’ is the perpetual public domain, be it a plaza, park, or flagpole on a publicly owned building. What is signified, by these signs, changes with whoever is perceiving it? It changes temporally and by how well it is transmitted and diffused in the national gaze of a much greater audience.

Therefore, the need for civil society to hold open public spaces where these grievances can be aired is essential to a democracy that wants to heal its imperfect past. The public space can be like a venue for transmedia production like a text can inform about the underrepresented. Their need for conserving the heritage of the counter-public spaces where their solidarity and protests could be shared is evident.

Edward Said claimed that the academy “is not the place where problems can be settled nor the place where injustices can be righted.”¹¹² Perhaps that was true before the cycle of protests spread worldwide since Tiananmen Square and the Arab Spring. The latest United States demonstrations in the public spaces have been against the lethal violence of police toward Black

¹¹¹ The official National Park Service Policy at Gettysburg where several Confederate memorial monuments were erected was posted: Many commemorative works, including monuments and markers, were specifically authorized by Congress. In other cases, a monument may have preceded the establishment of a park, and thus could be considered a protected park resource and value. In either of these situations, legislation could be required to remove the monument, and the NPS may need to comply with Section 106 of the National Historic Preservation Act and the National Environmental Policy Act before removing a statue/memorial.

¹¹² Edward Said, in a lecture once warned “...the Academy is not the world, the University is not the marketplace; it is not the place where social problems can be settled, not where colonialism can be defeated, where injustices can be righted.” Derrida thought the university is the place where play actually can happen as people are trying out things.

men and women. The change that universities embrace going forward may follow the general outcry of injustice aligned with expressions of support by mainstream corporations who are vowing to continue to meet the demands of the Black Lives Matter movement. Corporate-funded research can be part of the change that makes the academy a place where problem-solving is possible if done in the interests of social justice and not publicity or propaganda.

Noam Chomsky offers a mixed message, unlike Said's assertion about the academy not being part of the solution. While quoting Gramsci, Chomsky makes his outlook known about the changes needed to make the world a better place to live. Chomsky follows Gramsci's thinking by using the "pessimism of the intellect and optimism of will." Social groups' ability to respond positively to social, political, and economic challenges¹¹³ could be related to place attachment. Some of place identity's¹¹⁴ earliest work suggested that place attachment could make positive contributions. This concept was articulated by Stedman, who found, "We are willing to fight for places that are more central to our identities and that we perceive as being in less-than-optimal condition."¹¹⁵

Since the Thirties, many special places in the eight-state study area were documented by the relief programs of FDR's recovery efforts during the Great Depression. The photography for

¹¹³ "emergent scholarship relating place attachment to greater willingness to engage in collective action or more responsible community behavior that maintains or enhances valued attributes of the setting ... see the works of Davenport & Anderson, 2005; Payton, Fulton, & Anderson, 2005; Vaske & Kobrin, 2001.

¹¹⁴ Barbara B. Brown and Carol M. Werner, "Social Cohesiveness, Territoriality, and Holiday Decorations: The Influence of Cul-de-Sacs," *Environment and Behavior* 17, no. 539 (1985), <http://eab.sagepub.com/content/17/5/539.refs.html>. It is described as a "relation to the physical environment by means of a complex pattern of conscious and unconscious ideas, beliefs, preferences, feelings, values, goals and behavioral tendencies and skills relevant to (the) environment" (p.155). Also see: Place identity research including, Proshansky, Fabian, & Kaminoff, 1983, and Mesch and Manor's (1998) studies of neighborhoods reveal how shared experience and the development of contact and intimacy build an attachment; and Kemmis, 1990; Austin, 2004 for connection to place.

¹¹⁵ R. Stedman, "Toward a Social Psychology of Place: Predicting Behaviour from Place-Based Cognitions, Attitude, and Identity," *Environment and Behaviour*, 2002.... if attributes of a location are valued and resources are seen as lacking, then citizens would be more likely to take action to address perceived deficiencies.

the Agricultural security efforts, the Writers and Fine Art murals for public buildings, and the NPS / AIA partnership for the Historic American Buildings Survey were started. In the Sixties, many historic sites were designated NHL status, and later, many more private properties were placed on the NR list; districts were listed as well as National Historic Trails. The Eighties saw the NPS and IRS grant the HTCs, and small groups of concerned citizens and nonprofits received grants from the HPF, including the most recent Underrepresented Communities Grants.

For instance, in Butte, Montana, a visitor can see benefits from all federal programs. Although time has taken its toll or intentional displacements, many sites are still to be seen—the historically diverse populations, including a vibrant Chinatown that fell prey to boycotts and racial animus. “Butte, USA,” as the locals like to call their former mining mecca that once had the “richest hill” in the country that produced most of the copper in the electrification of America. Its labor movements were pioneering in progressive movements. A half-century after mining waned, the locals have fought to preserve its vibrant central business district that served the booming population engaged in the deep hard rock mining.¹¹⁶ The National Historic Landmark District designation claims to have the most resources than any other and has grown since its initial listing on July 4, 1961. Today, it encompasses Uptown Butte and Walkerville, then goes west to include Anaconda along the old railroad.¹¹⁷ It has received many federal assistance programs, including the longest-lasting national Folk Festival outside the Washington DC Mall. A substantial HTC was approved for the Hennessey building that once housed the

¹¹⁶ Michael P. Malone, *The Battle for Butte: Mining and Politics on the Northern Frontier, 1864-1906*, 2006 ed, The Emil and Kathleen Sick Lecture-Book Series in Western History and Biography 4 (Seattle: University of Washington Press, 2006).

¹¹⁷ Butte-Anaconda NHL was listed one year after the NHL program was authorized. In the NPS remarks it is considered one of the largest and most famous boomtowns in the American West. The expanded NHL is comprised of nearly 10,000 acres with 6,000 contributing resources in Butte, USA.

scions of industry from the Anaconda to the Montana Power Company grants went to the archives that the city maintains and the headframes of abandoned mines.¹¹⁸

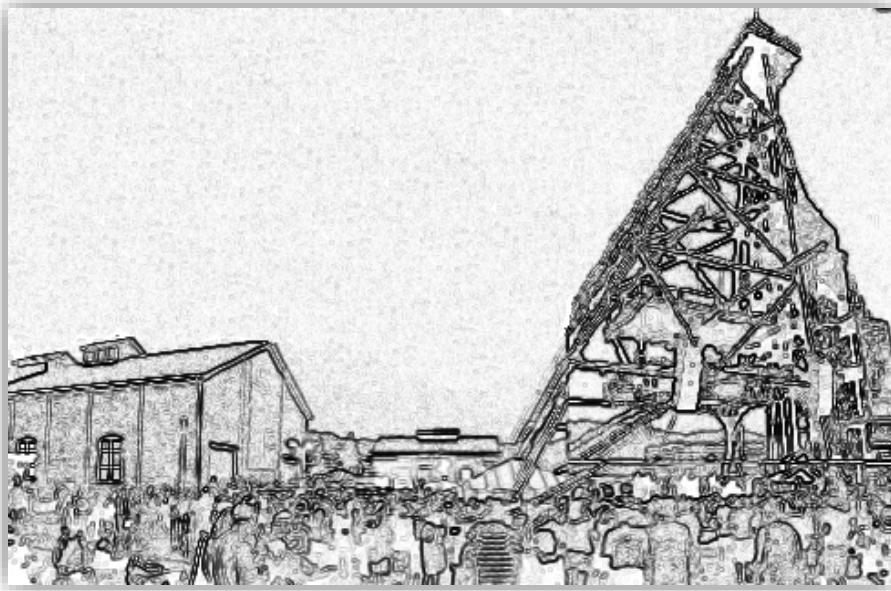


Figure 10. Butte USA Folk Festival

After its halcyon years, the same cooperation in Uptown Butte was not always the popular case in Anaconda, Montana, named after the largest corporate conglomerate backed by the Rockefeller investments for the copper fortune a mile below ground. Although it has always been the more impoverished sister city to Butte, it had a massive asset in smelters that played havoc with the environment until the unions finally stopped refusing to comply with the EPA rulings and quit clinging to their pollution causing jobs. As much as the establishment wanted no change when the smelter meant jobs were equal to their push back against the preservation of the

¹¹⁸ See the complete list of HPF grants and HTC projects containing Butte preservation activity in Appendix E.

downtown and the iconic giant landmark of a smokestack. National media covered the debate after the closures as the town split on the side of development versus preservation. Boosters of the new economic prospects wanted to make any change needed, including the destruction of the past so the town could rise like a phoenix with its new golf course and slag ground up for black sand traps. Others wanted to remember their old town and its historic downtown, including the smokestack even after the smelters were torn down.¹¹⁹

Since those nascent efforts around place identity research, there have been successors from the same City University of New York (CUNY) where Proshansky et al. began environmental psychology while I was a graduate student in urban planning/design. The recent work at CUNY's Public Space Research Group led by Setha Low¹²⁰ has helped community cohesiveness and diversity and offers hope for more democratic citizenship, community and civic society, and organizational humanism. The sum of all of those intellectual pursuits would equal a more Aware Civil Society (ACS).

Of the three problem areas identified in Chapter One, based on the scan of the environment affecting historic preservation and the cultural resources in general, it was the need to have a more 'Aware Civil Society' that presented a path for the research design. ACS was the main problem area worked on in the literature searches and the design for the intervention used for this dissertation. Surveying the old public administration model of government, with the

¹¹⁹ Laurie Mercier, *Anaconda: Labor, Community, and Culture in Montana's Smelter City*, The Working Class in American History (Urbana: University of Illinois Press, 2001). The chief historian Jerry L. Rogers for the NPS told of his face to face encounter with the antagonists in the art deco lounge of Anaconda after he announced the decision to not permit demolition of the smokestack. He ordered his customary drink of choice, a Manhattan, and got some blank stares back from the bartender and furthered the discomfiting feeling of an outsider government man in the midst of a town divided. Anaconda had its rebirth and the environment is recovering albeit as much as a superfund site can despite tremendous infusions of job-making mitigation of toxic wastes stored nearby.

¹²⁰ Low, *Spatializing Culture: The Ethnography of Space and Place*.

seminal works of bureaucracy, according to Max Weber,¹²¹ covered what operated for centuries and my own time as a civil servant. The trendy reinvention phase of the new public administration of the 1990s was based on the work of Osborne and Gaebler.¹²² The academy was leading the policymakers at that time and could do so again. A developing body of social science literature deals with the needs of governing society by making citizen participation in steering the ship of state more the central tendency. In the New Public Service,¹²³ ‘serving rather than steering’ is a basic premise that holds out promises of many changes in the future of participatory community-based governance:

- stresses citizens are more important for democracy and public service impacts
- communities are also crucial in civic ‘society’s new developments for public service
- a more permeable and fluid bureaucracy will be essential to organizational humanism.
- to gain a solid footing for the New Public Service. collaboration as the focus of improvements in the field of Information and Communication
- Technology (ICT) can be the leverage

Reading about the cultivation of local community stakeholders who share their acquired wisdom of a place and its community could be essential to making appropriate rules to govern with the electorate’s support. It touches on ostensive action or legend-telling.¹²⁴ Both oral history

¹²¹Max Weber, Guenther Roth, and Claus Wittich, *Economy and Society: An Outline of Interpretive Sociology* (Berkeley: University of California Press, 1978).

¹²² David Osborne and Ted Gaebler, *Reinventing Government: How the Entrepreneurial Spirit Is Transforming the Public Sector* (New York, N.Y: Plume, 1992). Reinventing Government was embraced by the nineties administration of Clinton-Gore. Its bureaucratic reforms took 10 plays from various authors and packaged like Steering not Rowing is the governmental function and unlike Weber, decentralizing was a way to have a more efficient and cheaper bureaucracy based on reinventions and market orientation.

¹²³ Christopher Reddick, *Public Administration and Information Technology*. Reddick, Christopher G. *Public Administration and Information Technology*. (Burlington, MA: Jones & Bartlett Learning, 2012).

¹²⁴ Linda Dégh, and Vazsonyi. *The Dialectics of the Legend*. (Bloomington, Ind.: Folklore Publications Group, 1973).

and ethnography depend on these testimonies, as do folklorists. The validity of ‘ostension’ as the real-life occurrence of events described by a legend can inform many outside researchers who must first win the trust of the communities’ key informants.¹²⁵ Using key informants for my research helped create a design and program evaluation guided by a logic model.¹²⁶ This work was researched through the Cooperative Extension services canon on community development and Agricultural Education.¹²⁷ What was created as an intervention is part of the next chapter and is a stepwise curriculum derived through a community quest for viable solutions.

To first learn, then to share the data is the *sine qua non* of the transmission of culture as used for Learning Places. Used in a pilot test project online, as the andragogical intervention, assisted those who volunteered to be service learners.

Part III Andragogy

The intervention aims to make an aware civil society, and by using the intervention program, an educational platform, any volunteer can choose to cultivate a liaison with community contacts both online and in person. Together they can choose a historic structure or cultural resource project. In addition, Andragogy can help prepare a teacher of adult learners.

¹²⁵ Soren C. Larsen, et al, ed. “Place Perception and Social Interaction on an Exurban Landscape in Central Colorado.” *Geography* 59 (November 2007). Key informants’ interviews were used in this article that was one of the rare instances where historic preservation intersected with rural community development.

¹²⁶ W.K. Kellogg Foundation, *Logic Model Development Guide* Cooperative Extension and community members,” followed a step-wise process, based on a logic model. See the Model used in Appendix A. Guidelines and Framework for Designing Basic Logic Model, http://www.authenticityconsulting.com/#_blank

¹²⁷ Kenneth R. Tremblay Jr, “Preservation Tools: Tools for Cooperative Extension’s Efforts in Historic Preservation,” *Journal of Extension*, Tools of the Trade, 41, no. 1 (February 2003): 1TOT4, <https://archives.joe.org/joe/2003february/tt4.php>. In Little St. Elmo, CO A book was produced that was donated to and sold by the local property owners association...” in this rare case of historic preservation and the Cooperative Extension. <https://archives.joe.org/joe/2003february/tt4.php>

III.1 E-Learning / E-Democracy (ICT)

E-learning and e-democracy technology benefits add diverse perspectives drawn from the New Public Service and ICT literature review. Through the technology used in a learning community (online), working socially in small groups can be explored. The co-creation of learning is aided in best clarifying and solving problems when participants take turns as moderators to facilitate the group discussions and presentations posted online. How well e-democracy fares are as yet unforeseen. Many more Americans use social media for personal family connections than online debating and participating in community decision-making public web-based meetings. The recent elections were subjected to more incredible scrutiny because of false claims of voting irregularities by the ousted POTUS. Lack of trust in the institutions could set back the enhancements for more e-democracy as more lose trust in such innovations even though it makes for more access, inclusivity, and transparency without traveling nights to city hall or county courthouses. Trust will need to be established in small incremental steps. One school bond vote was defeated after the informal online survey was overwhelmed by naysayers. That preliminary vote probably influenced the formal balloting that had funding to save a 1914 school building. A win for that school could have gone a long way to mitigate the publicity of Montana's rural schoolhouses. The appearance of the abandoned schoolhouse problem was included on the Eleven Most Endangered List by the National Trust in 2013.

For Fosnot,¹²⁸ effective learning occurs when participants actively construct knowledge according to the constructivist theory. Aspects of this theory are relied on heavily in the adult education fields researched for this literature review. With the advent of digital LMSs, using the

¹²⁸ C. T. Fosnot, *Enquiring Teachers, Enquiring Learners*. (New York: Teachers College Press., 1989).

internet asynchronously or with real-time applications, the social aspects can be simulated like in a seminar. The older analog versions of correspondence schools' mail-order books and test-taking or the later versions using CDs were eclipsed in the distance learning for the adult education field. The LMSs available for creating courses were compared. Most of the existing architectural job training for continuing education credit courses lacked any semblance of historic preservation of existing buildings. The few found on the AIA University increased each year to the point of representing a single-digit percentage of the hundreds of other convenient online courses that easily record the credits earned toward the annual minimum requirements. All existing courses were fee-based, and the free ones were product-specific such as new versions of hand railing to meet current codes.

The format and presentation technology was designed for adult education and targeted the specialist in enough technical detail to measure an outcome of learning by a final quiz after an hour of reading. There were no interactions with others; some embedded videos were of high production quality. An architect relying on those one-credit courses through their association website could spend 24 hours per year working on their required continuing education at the cost of around \$720 per annum. Commercial vendors would charge three times as much for a moderated course.

Service learners can be guided more in line with the constructivist theory using the online resources if they have something that can be manipulated interactively with others. In this setting, they construct their own experiences by selecting options that appeal to their needs at the time. The courses scheduled at a specific time can be problematic for those working regular business hours. An asynchronous course is preferable for adults who can take as much time to

mull over the new material and continue their education in stages as they are more prepared for the new information and more experienced with online systems. The constructivist theories date back a century ago, with Piaget, Dewey, and Vygotsky as the leading proponents. Vygotsky wrote, “The classroom needs to be seen as a democratic community of discourse engaged in activity, reflection, and conversation. Building communities of trust are critical. Dialogue within a community engenders further thinking.”¹²⁹

One solution to having a more aware civil society is education; of course, in a community of learners is considered best. For bonding in a community of learners, there needs to be a socializing space online. Students helping other students to master a lesson has been an age-old practice and works today in the multi-age elementary one-room schoolhouses that still operate in my part of Montana, where I was a guest teacher. The online space where cohorts can co-create enables more experienced learners to help newer members learn the ropes. Taking turns being a moderator who facilitates the work of the groups can satisfy the essential role of mentor/mentee when there is an absence of an instructor in front of a classroom. That is the kind of bonding of members of a cohort revealed by the literature research that will affect the design of an intervention for this dissertation’s research and analysis project.

A typical assignment for students to take turns as the facilitator/moderator for the cohorts can be beneficial. Students acting as facilitators will step up their own game by first mastering the lesson and the technology of the LMS before facilitating others. The role reversal enables the opportunity for critical thinking to appear amongst peers.

¹²⁹ Vygotsky, *Mind in Society: The Development of Higher Psychological Processes*.

Critical thinking is a necessary life skill of reflective and analytic thought. However, college students, even adult learners, are not initially ready for critical thinking and need to develop these analytical skills gradually throughout their college classes.¹³⁰

The instructors' lesson design needs to create a space and time for the students to reflect informally. Another proven aspect for engaging adults in a course can be the use of the service-learning model. If supported by the online LMS capabilities, it can interact with the host community for presentations and feedback. Lockhart asserted that a course with a service-learning focus lets the students "choose to implement their ideas instead of just considering the possibilities...there would be a lot of support for a professional development course that benefits the state and the community."¹³¹

The readings from the literature about the New Public Service point out that for it to be efficacious, it depends on building coalitions of civil society: the public, nonprofit, and private agencies to meet mutually agreed upon needs. The coalition-building model can be attempted with service learners and their host community based on articles exemplifying this practice.¹³² Reddick uses a table to compare the three generations of public service from the Old Public Administration (OPA), New Public Management (NPM), and the New Public Service characteristics and differences in the role of government (OPA=rowing, NPM=steering or and New PS=serving,)

¹³⁰ P.M. King and K.S. Kitchener, *Developing Reflective Judgment* (San Francisco: Jossey-Bass Publishers, 1994), <http://www.umich.edu/~refjudg/reflectivejudgmentmodel.html>; Reflective Judgment Model (RJM) follows the theories of John Dewey who observed that "reflective thinking is called for when people recognize that some problems cannot be solved with certainty". Macknight, Carol B. "Teaching Critical Thinking Through Online Discussions." *Educause Quarterly*, Viewpoint, no. #4 2000.

¹³¹ M. Lockhart, *"Helpful Hints, Desire 2 Learn, EDLD 529, Postsecondary Distance Delivered Education Course* (Bozeman, MT: Montana State University Education Department, 2013).

¹³² Christopher G. Reddick, *Public Administration and Information Technology*.. pg. 86-89 and Table 4-3.

For there to have been more historic preservation activity during the old public administration era and later in the experiments beginning in the 1990s, NPM took several acts of Congress prompted in the early sixties by the Councils of Mayors. That coalition support for a social movement to save the landmarks of America's great cities, which led to the passage of the NHPA in 1966, serves as a benchmark for current administrators to use. That support was the pinnacle of Congress serving the needs of the preservationist community, despite hostile pressure from commercial real estate interests, highway building lobbyists, and the executive branches of the federal government. Those past events will never be repeatable as times have changed, but they can serve as a guidepost for the future. It may take another national movement based on a different way, a middle way, if the existing collaborations of the local level preservation groups, where most of the energy resides, want to make historic preservation play a more prominent role within civil society to mitigate global warming and house adaptive uses.

III.2 Leveraging Civil Society to Protect Public Places.

The role of civil society remains essential, no matter if one defines it from a neoliberal, neo-Marxist, or the contemporary triadic model when viewed as the public sphere that is neither the market nor the state.¹³³ If civil society can be a mediator between the state and commerce, then the recent public campaign to save the HTC's is a good example. The National Trust demonstrated a shared concern over those “‘places” that have been intrinsic ‘to the communities’ sense of their heritages. ‘Place’ is center stage whenever there needs to be a

¹³³ Rosario Laratta, “Contemporary Civil Society Theory Versus Hegel’s Understanding of Civil Society, Social Welfare,.” Dissertation, Meiji University, Japan. Graduate School of Governance Studies, n.d. <http://www.intechopen.com/books/social-welfare/contemporary-civil-society-theory-versus-hegel-sunderstanding-of-civil->

meeting of minds between the state and the people about public unrest, protests or celebrations, fiestas, and cultural expressions by the people and for their enjoyment.

There must be a haven in a pluralistic society, what Mabel O. Wilson¹³⁴ referred to as counter-public spaces. These places serve a purpose whenever existential issues are apparently due to the inequalities of society. The resolution of these conflicts needs to have enough room and time to spend working on if a non-violent philosophy can guide the outcomes.

Recent technological communication improvements, such as the global use of the internet and social media via smartphones, add immediacy to the expression of the protests by the masses. However, it is not yet a ubiquitously effective way to avoid the violent reactions by the police powers of societies of control or the unlawful counterdemonstrations by wannabe militia. E-democracy could become a safer alternative for the disenfranchised to voice their objections. It would certainly be a way of being counted without bodily defending the ramparts with barricaded picket lines for demonstration marches.

J.B. Jackson had insights that public, “vernacular space is to be shared, not exploited or monopolized...it is in the literal sense of the term a common ground, a commonplace, a common denominator which makes each vernacular neighborhood a miniature commonwealth.”¹³⁵ The public space is a vital alternative way for sharing, be it for honoring one’s heritage, ceremonial commemoration, ‘protestors’ dissension or support, solidarity, aspects of public life, policies of

¹³⁴ Mabel Wilson, *Negro Building: Black Americans in the World of Fairs and Museums* (Berkeley: University of California Press, 2012).

¹³⁵ J.B. Jackson, *A Sense of Place, a Sense of Time*. New Haven: Yale Univ. Press, 1994

____ Donald W. Meinig and J.B. Jackson, *The Interpretation of Ordinary Landscape: Geographical Essays*,. (NYC: Oxford Press, 1979).

the state, either by the dominant hegemonic society or those protesting the excesses of either the state or the marketplace.

Public recognition of the significance of a historic property can be argued to link its physicality with the popular notions of public space. Thus, a private property recognized for its importance to the public is afforded more protection under the law than an unlisted one. On the other hand, there are situations where a potentially eligible property for listing on the NR will be surveyed and listed as contributing to a historic district of multiple properties. In either case, the way of thinking about the historic places is transformed by an overlay of officially approved ‘significance.’ Its continued existence in its official provenance will be essentialized, and any threats are to be avoided if they adversely affect those qualities that once made it eligible for listing on the National Register or as a National Historic Landmark.

Passing the approval process gains it a spot on the map for posterity to appreciate. Thus, a landmark designation acts as a signifier of highly regarded values and meets or exceeds criteria set by a national authority over historic preservation. The nomination narratives and photographs become the metadata that justifies the permanent embedment of the place (building, structure, or landscape) into the civic fabric of a community and region. The highest recognition of an NHL makes that pin on the entire country’s map a more significant one going forward.

Henceforth, these historic places provide another aspect of public space for the people to identify within their everyday world view and conserve it as an ideal marker for their public memory and personal sense of place. Conservation of heritage creates physical and psychic space for the public handed down laden with value attributes. The specialness of the place is something the public can learn, and its physical permanence can become useful to them even vicariously.

Even if no one enters it without invitation, its loci will remain a placement in the viewshed from a neighbor's window or at street level as a wayfinding clue to navigate in the cityscape. Its continued presence also adds an element for debate when the relentless march of progress spurred by the marketplace targets the property for commercial redevelopment. Then the historic place becomes a point of contention that fulfills the utopian idealization¹³⁶ of a participatory democracy that Habermas¹³⁷ theorized about the public sphere. Although the property is not textual, it can be learned, read by the beholding eye, and cared for by the public admirers for its qualities that ought to be defended.

The debate in the public sphere allows opposing views to be presented with the converse of each point made by the applicant. Some may have their investments eclipsed by the new competition, or neighbors will lose views, and sunlight may be blocked, rents may go up, and more vehicles will compete for limited parking. All are typical factors to weigh in judging the market realities versus the public's consumer or tenant rights as participatory citizens.¹³⁸ By exercising their democratic prerogatives, after generations of use and persistence for the neighborhood's historic place, one can only imagine who will stand up to the developers and speak for the landmark's survival amid the contested real estate. If its previous owners and

¹³⁶ Douglas Kellner. "Habermas, the Public Sphere, and Democracy: A Critical Intervention," n.d. "Critique of Jurgen Habermas's The Structural Transformation of the Public Sphere".

¹³⁷ Ibid. "But democratic theory also developed stronger notions of citizen participation, or what has become known as participatory democracy, in theorists such as Rousseau, Marx, and Dewey. In this conception, famously expressed by Abraham Lincoln, democracy is government by, of, and for the people. For such a conception of radical democracy to work, to create a genuinely participatory democracy, the citizens must be informed, they must be capable of argumentation and participation, and they must be active and organized to become a transformative democratic political force. Kellner" see footnote 81.

¹³⁸ Douglas Kellner. "Habermas, the Public Sphere, and Democracy: A Critical Intervention," n.d. "Critique of Jurgen Habermas's The Structural Transformation of the Public Sphere".. Habermas quotes from Kellner's paper: "...an informed and intellectually competent citizenry. Here the focus should arguably be on education and the media, for schooling and the media play a key role in enabling individuals to be informed, taught to seek information, and, if effectively educated, to critically assess and appraise information, to transform information into knowledge and understanding, and thus to make citizens capable of participating in democratic discussion and deliberation."

former city and state officials are long retired or gone, and they approved its nomination to the NR, then the application's narrative could be silenced without the intervention of local advocates for preservation. What narrative besides the NR nomination and the mute presence of the edifice will speak to the future generations? It will have to suffice to use whatever remains of those value-laden texts and photos, floor plans, and elevations from the nomination that justified the continued preservation of the historic places. Because it once was important enough to complete by the owner and later found to be significant at the state and federal levels, its preservation matters, but it is not guaranteed.

According to Harari's book *Sapiens: A Brief History of Humankind*, Hegel's views on civil society at the end of the 18th century were prescient about the dynamics of the market, state/individual, and family of today, "The industrial revolution...managed within little more than two centuries to break these building blocks into atoms."¹³⁹ What Hegel described, even before the changes of industrialization crossed the Atlantic to the Americas, was foretold in Germany. Now it has become an everlasting condition. Harari said, "Most of the traditional functions of families and communities were handed over to states and markets."¹⁴⁰

According to Davenport and Anderson, "places are important in developing and maintaining self and group identity as well as a "person's well-being."¹⁴¹ "Research has shown that where there is a loss of place, due to displacements, the consequences can be severe. Adverse effects, including the "inability to continue to practice and recall experiences; to feel

¹³⁹ Yuval N. Harari, *Sapiens: A Brief History of Humankind*, First U.S. edition (New York: Harper, 2015). .

¹⁴⁰ Ibid p.355

¹⁴¹ Mae A. Davenport and Dorothy H. Anderson, "Getting From Sense of Place to Place-Based Management: An Interpretive Investigation of Place Meanings and Perceptions of Landscape Change," *Society & Natural Resources* 18, no. 7 (August 1, 2005): 625–41, doi:10.1080/08941920590959613.

(what was once theirs to feel) due to lost objects, and a loss of identity of a place,” follow. The results can disintegrate ‘one’s self or group identity when the elements that reflect a person’s past are lost or changed in use or function. If the elements that lend meaning to a sense of place are maintained or conserved, it can contribute to self-identity and a shared sense of community.

¹⁴² Designating a privately-owned home on a familiar street as a historic site lends those elements ‘to someone else’s cherished memory of their cultural landscape if it can retain a sense or spirit of the place.

Norberg-Schulz explicitly adopts a phenomenological and Heideggerian approach, suggesting that “the spaces where life occurs are *places*...A place is a space that has a distinct character. Since ancient times, the *genius loci*, or spirit of place, has been recognized as the concrete reality *people* have to face and come to terms with within their daily lives.”¹⁴³ Furthermore, “Architecture means to visualize the *genius loci*, and the task of the architect is to create meaningful places whereby they help everyone to dwell.”¹⁴⁴ A blogger wrote: Norberg-Schulz’s book, *Genius loci*, meaning the ‘*spirit-of-place*.’ He says, “Socio-economic issues are not the most imperative in shaping *genius loci*, then he quotes: “The existential meanings have

¹⁴² “Quebec City Declaration on the Preservation of the Spirit of Place,” n.d. [ICOMOS Quebec Declaration: Spirit of the Place](#). ICOMOS declaration helps nations with the elements that are “defined as a mix of tangible (buildings, sites, landscapes, routes, objects) and intangible elements (memories, stories, written documents, rituals, festivals, traditional knowledge, values” The National Register nomination form considers these elements when evaluating significance which has seven elements that illustrated in the online course.

¹⁴³ Edward (Ted) Relph, “Placeness, Place and Placeness,” *Spirit of Place / Genius Loci*, March 2015.re Good public squares are described in six contributing factors integrating the architecture with the space, mindful of siting of monuments, defining enclosure, pleasing proportions, pivot points and harmonious grouping. All special places have the elements of form, activity and meaning according to Relph after the work by J.B. Jackson in *A Sense of Place, a Sense of Time*; Meinig and Jackson, *The Interpretation of Ordinary Landscape: Geographical Essays*.

¹⁴⁴ Christian Norberg-Schulz, *Genius Loci: Towards a Phenomenology of Architecture* (New York: Rizzoli, 1980). (*Quotes modified for gender neutrality from ‘genius loci’) Architectural phenomenology emphasis on human experience... positions itself in contrast to the anti-historicism of post-world war style of modernism. Phenomenology movement helped to provide legitimacy to the idea that historical buildings had valuable lessons for contemporary designers. The acceptance of history was a challenge to post-war modern architecture, thus, it eventually led to postmodern architecture.

deeper roots. They are determined by the structure of our being-in-the-world. A few of his key principles are listed below:¹⁴⁵

- Gathering: Creating possible relationships between natural and human-made places
- Visualize: building establishes anthropological understanding of nature by recreating what is seen in nature
- Complement: building adds what is apparent to be missing in nature
- Symbolize: building reveals human understanding of nature and self by deciphering that understanding onto built-form.¹⁴⁶

The phenomenological senses of place approach model involve behavior, body, emotion, attention, perception, memory, orientation, spirituality, meaning/value, and culture/sociality. Add to these the new work in neuroscience that delves into the structure of brains and perception, memorization, link, assess, and use spatial information. “Reinforcing the phenomenological argumentation for human geography and environmental psychology is the reported evidence that ‘place’ does indeed constitute a distinct dimension in neuronal processing.”¹⁴⁷

D.W. Meinig introduced a practice with the geography students at Syracuse University written up in seminal essays known as the Beholding Eye or Ten Versions of The Same Scene. The concept encourages everyone to notice the landscape around them using an aid describing ten factors. Don Meinig’s work is included in the Learning Places modules for extra credit in the ten elements of cultural landscape description by the service learner. There can be a more

¹⁴⁵ <https://htcasif.wordpress.com/about/> review of *Genius Loci: Towards A Phenomenology Of Architecture* by Christian Norberg-Schulz [Posted on April 12, 2016](https://htcasif.wordpress.com/2016/04/12/genius-loci-towards-a-phenomenology-of-architecture-by-christian-norberg-schulz/) by [htcasif](https://htcasif.wordpress.com/2016/04/12/genius-loci-towards-a-phenomenology-of-architecture-by-christian-norberg-schulz/) a blogger reviews seminal books of architecture at <https://htcasif.wordpress.com/2016/04/12/genius-loci-towards-a-phenomenology-of-architecture-by-christian-norberg-schulz/>

¹⁴⁶ Norberg-Schulz, *Genius Loci*.

¹⁴⁷ Charis Lengen and Thomas Kistemann, “Sense of Place and Place Identity: Review of Neuroscientific Evidence,” *Health & Place* 18, no. 5 (September 2012): 1162–71, doi:10.1016/j.healthplace.2012.01.012.

_____. NobelPrize.org. Nobel Prize Outreach AB 2021. Fri. 9 Jul 2021.

<<https://www.nobelprize.org/prizes/medicine/2014/press-release/>> Okeefe et al won the Nobel Prize for the discovery of the brain cells used for mapping memory like a GPS. The study of place and memory has opened up to the intersection of multidisciplinary including sociocultural, psychological, and political-economic. The promising work in brain cells by Okeefe and other Nobel winners found mapping cells exist and how this promises to help Alzheimer medical research and millions of refugees with PTSD symptoms due to displacement.

inclusive model for bringing attention to traditional cultural properties and sacred places in this work. Included as an Extra Credit field exercise in the online course, Learning Places. See number Six Landscape as Place below:¹⁴⁸

6	<u>Landscape as Place</u>	
	an individual piece in the intimately varied mosaic of the earth	
	engages all of our senses, the sounds, and smells	
	the ineffable feel of a place.” Our “living tether.”	
	The individuality of places, subtle and immense importance	
	that all human events take place, all problems	
	anchored in place,	

Table 2 Donald Meinig’s Ten Versions of the Same Scene

To be cognizant of the significance attached to a setting depends on how meanings are layered. Add to this challenge the complexity of diverse communities having different temporal associations with the place under study. The migratory changes are one of the constants as successive movements of people add new stories to the old. The folklore will be as varied as the people are diverse in their life experiences, as shared in narratives, and the quantitative values are profiling their socio-economic demographics. The critical analysis work in gender and race, intersectionality, and indigeneity can reframe old arguments in new ways, so others’ stories of people and places previously silenced can finally optimize inclusivity.

¹⁴⁸ Meinig and Jackson, *The Interpretation of Ordinary Landscape: Geographical Essays*, Meinig, Donald W., and J.B. Jackson, *The Interpretation of Ordinary Landscape: Geographical Essays*, NYC: Oxford Press, 1979.

The state can also contest the public's space. It can become the excuse used by societies of control for the state's retaliation to restore law and order to the place where dissension is demonstrably used to confront inequities or grieve oppression. The commons have often figured into civil protests where conflict resolution is demonstrated vividly and at times violently. The canon on the environment emphasizes conserving the commons' as a shared resource for future generations. Conserving the commons of the historic built environment can mean the space that serves as the crucible for public policy amalgamation from disparate perspectives. The polarity of opinions of the pluralistic society, and a right to dissent and protest, contribute to the sense or spirit of the place,¹⁴⁹ as in a battlefield or on a bridge in Selma, Alabama.

Diversity changes the context of a place in people's minds, where learning places construct the sense of place. For example, the Roman beliefs in the guardian spirit occupying the space, the *genius loci*, held power only in their minds' eye despite the poetics of their belief system; it did not dwell supernaturally amongst their furnishings and mosaic floors or in the vapors of wetlands. People construct their worldviews based on their background and learned narratives, and life experiences. For a researcher to know these cultural layers attributed to the same place as an outsider will involve ethnography.

¹⁴⁹ Recent protests around the Black Lives Matter issues occurred in Lafayette Park in front of the White House that were forcibly violated by the fascistic tactics that subordinated the constitutional rights of free speech of the people gathered in the public space. As the nation's front lawn, it is regularly used by demonstrators for all manner of causes. This crackdown on peaceful protest, a cornerstone of American democracy was reminiscent of the society of control standoffs at Bunker Hill, Kent State University, Tiananmen Square, Hong Kong, the Kremlin, Nazi occupied Europe, and the Arab spring occupation of Tahrir Square in Cairo. Public space is a universal necessity against tyranny by despots.

III.3 Current Practices in Preservation Education

The efficacy of grassroots efforts for historic preservation has been reported for the inner city and its surrounding subdivisions. Exurbia, rural, and remote areas were not well documented in the body of the historic preservation readings. Efforts for more cooperative preservation work included local communities with grant funding. There were studies for the Virginia City Preservation Coalition and other ‘gateway’ towns to the national parks and outreach by the award-winning program called the Community Design Center, now in its fifth decade of outreach help, a mandate of the land grant university, MSU. Archives were researched at local and state museums and in special collections in regional libraries. An unpublished manuscript for the School of Architecture (SOA) at MSU, by John Dehaas for the 75th anniversary celebration of the school, was updated by my study for the 125th Anniversary of MSU.¹⁵⁰

The 2014 book¹⁵¹ *Preservation Education: Sharing Best Practices and Finding Common Ground*, edited by Steifel and Wells, had two chapters devoted to distance learning. The authors of the two chapters¹⁵² have staked out different experiences for the reader. The editors set the tone of the book with their statement that “the heritage conservation is not just another job,” but rather a mission, a state of mind, a responsibility, and an approach.” The reasoning stems from

¹⁵⁰ I supplemented the unpublished history of the SOA with an update on Women at the SOA, for the incoming director’s information. At the time the school maintained the same average ratio of male faculty to female since they first began hiring women back in the Sixties. The faculty for forty years was only male and now has a 1:2 ratio of women to men or about a one third are women. Survey questionnaires were sent by email for the 125th anniversary to Montanan alums who are engaging in preservation work, teaching HP courses, or had previously taken an HP course while at MSU. One response from the director of the Preserve Montana a nonprofit organization has excerpts in Appendix C. A study of their nonprofit in Helena was conducted as well for social entrepreneurial organizational evaluation for the Jake Jabs Business College of MSU. Their former name was Montana Preservation Alliance.

¹⁵¹ Stiefel and Wells, *Preservation Education: Sharing Best Practices and Finding Common Ground*.

¹⁵² Ibid. Chapters of note include 1. Delivering a Changing Conservation Curriculum by Distance Learning in the Twenty-First Century by Henry Russell and Philp Leverton. And 2. Public History, Adult Students, and the Community Moving Beyond the Distance-Education Classroom by Anastasia L. Pratt.

the conservation community shouldering the burden of passing on to future generations the significant tangible artifacts and intangible cultural values.

Heritage conservation conservators are in a very dynamic field, researching and preventing further decay by finding those methods to prolong the historic fabric that embodies the salient features and significant values. These actions are a continuum of concern, usually based on a consensus-building decision-making approach amongst stakeholders and authorities complicated by heterogeneous value systems, some of which are traditional and sacred. The career paths offer unlimited variation in projects because of the multitude of building types, values ascribed to their heritage stories by diverse users, stakeholders' needs and desires, and heirs or other 'keepers.' The job security is guaranteed by the entropic nature of the built environment exposure to the elements.¹⁵³ Being mobile is de rigeur, and online learning seemed the best way to reach busy professionals who are often on the road.¹⁵⁴

Editors Stiefel and Wells stated that there is "much to be learned from distance learning education that can take place from anywhere (in contrast to somewhere)—by means of new technologies and modes of communication."¹⁵⁵ Their book, *Sharing Best Practices...*, introduced work from all over the world. For instance, in Russell and Leverton's chapter¹⁵⁶ on the curriculum delivery in the 'UK changing shape of the university and college-level education

¹⁵³ Entropy is discussed in the Second Law of Thermodynamics by Rudolf Clausius. Energy will be transformed as it is depleted from one state to another in any fabrication or system and matter will deteriorate over time due to external forces to the point of needing replacement unless conserves the embodied energy by applying treatments that tend to prolong useful life cycles.

¹⁵⁴ The preservation technician program at Montana Tech in Butte, MT closed after operating as a two year technical college certificate program. No reason was provided for its short life at the academy. Butte has many abandoned historic buildings in the largest historic district in the USA.

¹⁵⁵ Stiefel and Wells, *Preservation Education: Sharing Best Practices and Finding Common Ground..*

¹⁵⁶ Ibid., *Delivering a Changing Conservation Curriculum by Distance Learning in the Twenty-First Century* by Henry Russell and Philp Leverton.

in the field of preservation. E-learning rather than classroom-based tuition-based programs were discussed for a broader range of heritage buildings, structures, and settings. Locals felt conservation of their old industrial sites “helps to define our identity.”¹⁵⁷ Ranges of perspectives have become the current thinking as awareness increases the need to have assets’ significance understood more broadly.

For vernacular, a term defining architecture without architects for some, studies over the past sixty-five years were “academic and...restricted in their wider public appeal,” so the challenge: “to make understanding of the vernacular heritage more accessible to a wider range of community.”¹⁵⁸

Sustainability of these resources is another land management concern, and reuse of historic buildings can mean lower carbon consumption, and it retains the energy already embodied in the property. The UK adheres to the international standard from 1979, called the Australian Burra Charter, “shift toward heritage values and significance of places.” The English Heritage initiative called Power of Place included the public perception of their heritage.

A challenge for a growing number of campus-based higher education institutions that technology leaders have recognized “place-based institutions could become less important over the following five years due to the rise of online options,” said Bill Gates.¹⁵⁹ For example, the UK’s CEM had been using “alternatives to the classroom-based model of delivery” using Moodle and Blackboard for post-grads who take electives in their second year or part of an

¹⁵⁷ Ibid.

¹⁵⁸ Stiefel and Wells, *Preservation Education: Sharing Best Practices and Finding Common Ground*.

¹⁵⁹ Bill Gates in a 2012 interview for the Council of Higher Education by Jeff Young. <https://www.chronicle.com/article/the-gates-effect/>

MBA. The criticisms of online delivery assert there is a lack of hands-on experiential learning onsite with crafts demonstrations. While the pro argument counters with “online demonstrations and guided tours,” ... provide a more inclusive approach to these aspects of a program for students who may not be able to attend in person—either in real-time or on-demand online.¹⁶⁰“ A hybrid approach can be the answer to the critics, blending face-to-face and online learning with site visits and periodic meetings in classrooms.

NYS Empire College course reported by Anastasia Pratt.

The text box compiles the highlights by Pratt, “...emphasized both theory and methods of public history as students applied themselves to local community resources and assets. Students complete oral histories by interviewing people from their local towns. Students immerse themselves in the local history and invite those at work in the museums, archives, societies, and libraries to join the academic world as expert advisors.

Out of this collaboration came webinars, speaking engagements for both students and advisory experts, forming an interplay of preservation education and public history.”

Anastasia Pratt asserts that “Distance education...has taken root in American society...with...a plethora of ...technologies and online learning options designed to create collaborative learning experiences for students...have served to limit the barriers to continued education¹.

The Empire State College offers the required graduate-level course credits, fifteen as per the National Council Public History (NCPH), before awarding a certificate to

Figure 12. NYS Empire College Course Reported by Anastasia Pratt

In summary, some challenges presented by the chapter’s authors, Russell and Leverton, were mixing the technology of distance learning while maintaining an appropriate level of

¹⁶⁰ Stiefel and Wells, *Preservation Education: Sharing Best Practices and Finding Common Ground..*

intellectual content related to heritage conservation for culturally diverse places and future career paths.

A blended curriculum has been underway in the state university system of New York, reminding me of the forty-year legacy of the MSU Community Design Center and attempts to broaden architectural students in a program to serve the parks and partner sites that I initiated in 1997 called the NPS Cooperative Program for Architectural Conservation.

Adult education adds more complications while broadening the scope to include those at great distances in the Northern Rockies.

Those distant students must find local affiliations, although hundreds of miles from the campus or instructor, which is the essence of public outreach. In New York's Empire College program, "Interaction with others enrolled in the course, either asynchronously or in real-time, was a requirement because it serves the purpose of mutual engagement of learners in the learning process."¹⁶¹ "The program goal,

serve the community by promoting historic preservation as a means to build broad cross-cultural understanding, be involved in local, national, and international service and educational activities with stakeholders in academia, government, and civil society Community-based projects heighten student awareness of the local impact of broader historical events...and bring the community together."¹⁶²

¹⁶¹ Ibid.: Pratt, p.164,

"This collaboration echoes John Dewey's belief that effective learning requires a 'shift from the memorization of a body of knowledge to a process of inquisition, knowing and understanding.'" Ernest L. Boyer added: responsibility for learning is on the student who pursues his education according to his individual needs and interests. Prospectus for a New University.

¹⁶²Ibid. Other programs besides Pratt's were mentioned: Goucher which is only two weeks long, too short for community connections; Savannah College of Art and Design uses E-Learning since 2012; only SUNY Empire State College was affirmed to be an open education provider (with tuition of course). Other programs are at a university level for those matriculating: Boston U., Charleston/Clemson, Columbia, E. Michigan, Ball State, Delaware State, Tulane, Art Institute of Chicago, SUNY Albany, Minnesota, Roger Williams, Ursuline, USC, Auburn and Vermont. None west of the Mississippi River.

Jeremy C. Wells, one of the editors, wrote a chapter with references echoed by some other authors about the architects' training being considered inadequate for the preservation field. Furthermore, he argues that "doctrine is woefully inadequate" when forming a basis for practice if the premise is that people benefit from the identification, interpretation, and treatment "of conserving the historic environment."¹⁶³ The doctrine includes the Secretary of the Interior Standards, the international Venice Charter, as modified over time. In contrast, he exhorts the discipline to move toward methods to provide empirical evidence for these doctrines that everyone expected to take for granted over the past half-century.

Wells points out those areas lacking empirical evidence that scholars could move their gaze towards:

- People and environs interaction
- Perception, valuation, changes to resources
- Authenticity assessments.

One example of progress toward filling these gaps comes from the preeminent training center for mid-level professionals in Rome, Italy. ICCROM's training center, field school in Israel's multicultural ancient city of Acre, was offered as a case study for best practices by Shelley-Anne Peleg. In the previous century, a comment by a Roman architect-planner, Gustavo Giovanni, "perceived that it is essential that architects should have an integrated training...with traditional building techniques as well as...innovations...attuned to social needs...respectful of

¹⁶³Ibid.

context.” In Peleg’s other words, “a ‘holistic’ approach forgotten...but should be revived in...education.”¹⁶⁴

It is the first phase of any project where research and evaluation of both physical and intangibles are needed, including economic and social factors. Peleg admits the need for architects and planners, although lacking “the skills and knowhow to fully complete this phase.”¹⁶⁵ Architects in these first phases of a project use their abilities to address “aesthetic and architectural issues... identity, survey, record sources...analyze these...in the site’s historical significance.”

Peleg’s critical analysis suggests that specialists like architects and conservators lack a point of view and skills to enhance social issues and community needs. They are often unable to fully identify and quantify cultural, social, and emotional attachments that connect a community to a place.¹⁶⁶ Thus, the cultural significance created by living people is lost forever.

With so many of the required attitudes, behaviors, and knowledge lacking in the development team of specialists, it is little wonder that projects run aground before completion, deferred on technical problems, thus introducing incompatible materials and leaving residents unhappy “who remain alien to the sites or feel neglected and forgotten by the development

¹⁶⁴ Stiefel and Wells, *Preservation Education: Sharing Best Practices and Finding Common Ground*. Peleg, Shelley- Anne chapter nine re: Saving the Stones---Practical Conservation Training Program: A Case Study of the ICCROM, Citt’ di Roma (in Acre, Israel). www.ICCROM.org is the International Centre for the Study of the Preservation and Restoration of Cultural Property

¹⁶⁵ Ibid. Pegel’s list of what is lacking in the preparation of architects and planners when it comes to heritage conservation seems daunting, but they are not alone. The architects “lack an understanding of materials, application methods, and implementation skills. Engineers may not appreciate heritage values. Material specialists are not fully aware of documentation procedures...” (they usually get involved at implementation stages) and tourist developers...don’t understand other stakeholders and worst of all property developers can be oblivious to social needs and how to deal with community participation. This spells a formula for unhappy residents.

¹⁶⁶ Ibid. Pegel. The architect as specialists can’t do it all but she allows they are facile with recognizing architectural qualities’...design, spatial relationships, mass, form and proportion, influence of light, color and texture, and details and the use of materials and assess how these compare... to others of the same age and type”.

organization.” Interaction between stakeholders with the help of sociologists and social workers can bring abilities, qualities, and know-how to the planning stages. Diverse interactions could help the team recognize that “a place of significance embraces certain qualities, for which it has become a focus of spiritual, political, national, or other cultural sentiments for the inhabitants.”¹⁶⁷

Several articles spoke to the need for more multidisciplinary dialogue to enrich the profession with new expertise and skills. If this can become transformational, it will come through education that can “produce pluralistic perspectives for heritage conservation and interpretation needs of a holistic approach.”¹⁶⁸ Beyond the basic training toward a degree, the need for continuing education has been recognized by European countries that have created accreditation and certification systems designed to make better professionals.¹⁶⁹

Wells authored an article that could enhance undergraduate and graduate-level basic training by adding another layer or track with social science research. Perhaps the thesis topics chosen from a broader architectural school curriculum will better prepare these technical professionals engaged in the built environment.¹⁷⁰ To be more well-rounded graduates, they ought to find ways to work alongside others from the humanities/social sciences and have hands-on experiences with communities’ cultural resources.

¹⁶⁷ “Quebec City Declaration on the Preservation of the Spirit of Place,” n.d., ICOMOS Quebec Declaration: Spirit of the Place. [ICOMOS Quebec Declaration: Spirit of the Place](#)

¹⁶⁸ Stiefel and Wells, *Preservation Education: Sharing Best Practices and Finding Common Ground*.

¹⁶⁹ There are professional qualifications set by the NPS for those working on their cultural resources within the broad fields of CRM. In the U.K there was a study for the description of competencies towards accreditation commissioned by Historic Scotland.

¹⁷⁰ Stiefel and Wells, *Preservation Education: Sharing Best Practices and Finding Common Ground*.

Open Education is another growing field of higher education institutes, and technology is playing an essential role: “that increased access help to address inequalities related to class, gender and race as well as those created by limitations of time and space.”¹⁷¹ Perhaps Carl Rogers’ conception of education, “We cannot teach another directly; we can only facilitate...learning,” sums up how providing theory and method, local opportunities, and reading resources can bring someone the tools needed to join an academic institution and discipline. Students actively tie together academic and theoretical work in the discipline with practical experiences in public institutions. The Empire State seemed to be a successful case study as it showed how they cemented understanding of the academic discipline, its theories, and methodologies.

Both the National Council for Preservation Education (NCPE) and the National Council for Public History (NCPH) suggest applying theories and methodologies of public history to hands-on projects (haptic). Overcoming the obstacles of traveling over long distances was exemplified by the Empire State College model that presented enumerated best practices worth repeating: clear course objectives, readings, and timely feedback using various forms of communication.

The literature review helped form the three-part research questions not previously answered by the vast corpus of American Studies, Historic Preservation, Pluralism, Andragogy(preparing teachers of adult learners). In the American Studies and Historic Preservation canon, numerous pieces were grappling with the lack of diversity in the long-

¹⁷¹ Graham Attwell, “Radical Definition of Open Education,” anuary 2010, <http://www.pontydysgu.org/2010/01/a-radical-definition-of-open-education/>. <http://www.pontydysgu.org/2010/01/a-radical-definition-of-open-education/>.

standing homogeneity of the dominant culture. In particular, preservation literature overlooked rural area conservation of those areas studied as cultural landscapes, especially when seeking the character-defining elements of a sense of place. Community participation in those underrepresented areas, including the rural and disadvantaged urban tracts, has benefited studies that emanated from universities with outreach as its mission.

Where official government programs have failed to reach those sectors of the civil society, the grassroots efforts of nascent preservation organizations set the archetypal movement that has matured into national preeminence. Although the efforts by organizations have matured, there is still missing a consensus accepted by all of the educational institutions for a clear template on how to train the next generations of dedicated preservationists. Perhaps the work in democratizing e-learning through technology will make possible a renewed pluralistic social movement that increases demand for college credit courses. To help the thrust be as inclusive as possible and end the inequities for educational access, the preservation community can expand its appeals to many diverse populations in rural areas and inner cities.

At the fiftieth anniversary of the NHPA of 1966, many nonprofits and the governmental preservation agencies vowed to make the future more inclusive, so the new studies of the demographics that could be enlisted for the resurgence of a preservation movement feel they have a stake in the programs“Educating and involving the public may, therefore, be one of the most important single tasks that lie ahead for those of us who are willing to make the effort,” asserted, Laura Beaty¹⁷². Finally, There was a unanimous prediction that education will play a

¹⁷² Laura Beaty, “How Well Is the National Park Service Managing Its Cultural Resources: The NPCA Point of View,,” *California Press*, no. Vol. 9 No. 2. pp. 125-134. NCPH (Spring 1987).

significant role in making civil society more aware of the plight of the heritage around the rural areas and those underrepresented by previous preservation activity. In addition, the government-private sector partnerships around opportunity zones and HTC's and the new markets and low-income housing initiatives will funnel more capital gains investments into those disadvantaged census tracts designated by each state.

An ethnographical procedure played a role in the real-time activity of my interactions with the small world of preservationists and would be trainees from the architectural profession. I used the new procedures from the literature to moderate the public digital space online. In addition, data collection from observations of those engaged in parks and preservation activity in public places based on Setha Low's work with others at CUNY, who developed the Rapid Ethnographic Assessment Procedures (REAP),¹⁷³ has aided the NPS and my research.

The work for generating theory from decades of preservation activity in a specified study area was influenced by the work of Corbin and Strauss¹⁷⁴ and Glaser and Strauss.¹⁷⁵ The work by Glaser was especially apropos due to the limited critical analysis of the past decades of preservation activity using multivariate data analysis. Glaser's offers his take on the method, "The general idea of the constant comparative method can also be used for generating theory in quantitative research... one compares findings within subgroups and with external groups...constant comparative method is concerned with generating and plausibly suggesting

¹⁷³ Low, *Spatializing Culture: The Ethnography of Space and Place*.

¹⁷⁴ Anselm L. Strauss and Juliet M. Corbin, eds., *Grounded Theory in Practice* (Thousand Oaks: Sage Publications, 1997).

Barney G. Glaser, Ph.D. "The Constant Comparative Method of Qualitative Analysis" 07, no. 03 (Nov.2008).
<http://groundedtheoryreview.com/2008/11/29/the-constant-comparative-method-of-qualitative-analysis-1/>.

¹⁷⁵ Glaser and A.L. Strauss. *The Discovery of Grounded Theory: Strategies For Qualitative Research*. New York: Aldine DeGruyter, 1967.

(but not provisionally testing) many categories, properties, and hypotheses about general problems (*e.g.*, the distribution of services according to the social value of clients).”

The review of the successful use of the REAP procedures will help group the many conjectural hypotheses and find observable factors indexed for later comparisons. For example, if I use the Glaser and Strauss methods to compare the data from the official report, I could generate inferences from my created datasets. The published annual reports of results from the NPS Historic Preservation Funds’ grants-in-aid of local preservation projects and the private sectors’ utilization of the HTC programs can provide a context for the past twenty years of the civil society’s initiatives for historic preservation. The incentives for communities, groups, or private property owners to save cultural resources have been a small part of the Interior Department’s statutory outreach for four to five decades. However, it is a considerable part of the national preservation program many could not do without. It is time that its effectiveness is measured in a contextual way to use a baseline for my intervention evaluations.

Covering the “many properties of a category...to write formal propositions about ” preservation activity in an eight-state study area is presented in later chapters of methods and results. I chose to use the Glaser and Straus constant comparison methods because they can be “useful at the exploratory stage of theory development and can easily be translated into propositions ... if a formal hypothesis is required.”¹⁷⁶ As in the arc of the plot for the film *All the President’s Men* that investigated the corrupt burglary break-in by Richard M. Nixon’s

¹⁷⁶ B.G. Glaser and A.L. Strauss, *The Discovery of Grounded Theory: Strategies Fro Qualitative Research*. (New York: Aldine DeGruyter, 1967).

Republican operatives of the Democratic HQ at Watergate, I too will be following the money to gain my insights.

Of the three problem areas identified in Chapter One, the need to have a more ‘Aware Civil Society’ (ACS) presented a path for the research design. ACS problematics helps to focus on the design for the intervention used for this dissertation. Having a trained workforce and professional guidance will involve retraining and opening up educational opportunities through online learning at a minimum. That could inspire more higher education institutions to offer credit for these service-learning projects by matriculating graduate students. The intervention designed and tested for the dissertation will benefit from the literature on how best practices in preservation education have made a difference. Before evaluating the programs of the intervention, I will present in the next chapter the data and screenshots of an online course syllabus, content, and assessment instruments used since it was launched in 2019. Some of the highlights of those measurable aspects of the intervention that allow my assessment of learners’ progress in growing their competency will be included.

CHAPTER THREE

THE ONLINE INTERVENTION

Chapter Three covers the online intervention in three sections. The first part describes the Learning Places program and the curriculum's objectives, content, and flow. Part II explains how the curriculum leads to the knowledge gain, attitudinal, and behavioral changes necessary to mitigate the perceived barriers to historic preservation activity. The participants' assessments are found therein. The third section, Part III, describes how the curriculum reflects or embodies any key ideas from Chapter Two's literature review.

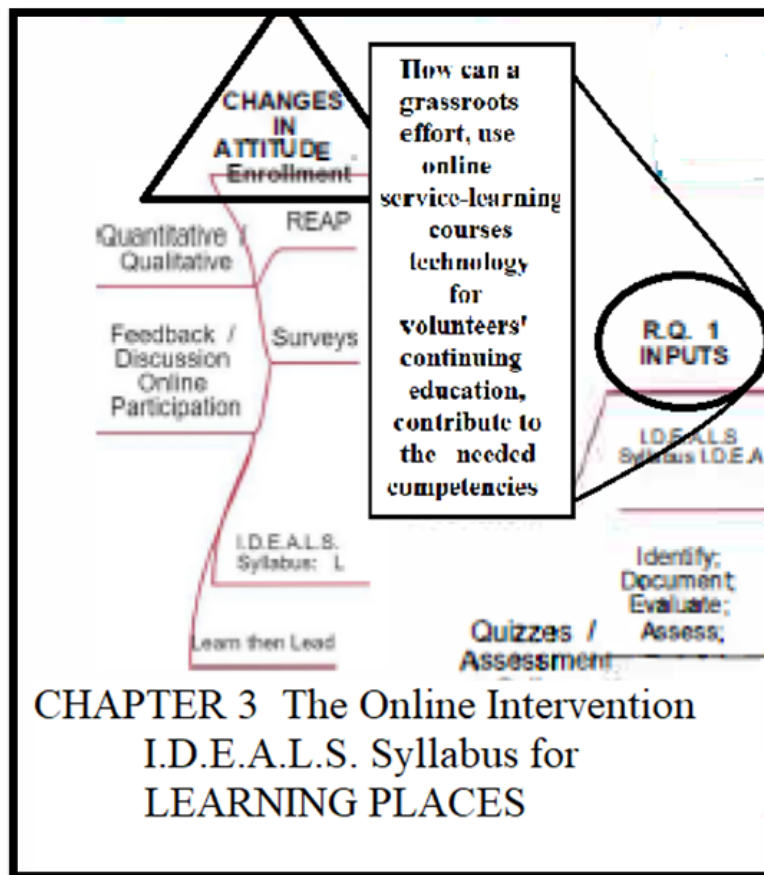


Figure 13. Mind Map Excerpt Detail for RQ 1

Part I. Description of the Objectives, Content, and Flow of the Curriculum

Learning Places (LP) offers continuing education using combined service and online learning methods to help communities save their cultural resources. It uses a new approach, a syllabus called IDEALS, for learning the concepts and the best practices of preservation treatments and cultural resource management services. Service learners will learn historic preservation core concepts and complete a final presentation to a host client in the local community. The online intervention, LP, was conceived of, designed, and implemented to be a permanent online presence where the public could pursue continuing education via an online course anywhere and anytime.

The problems mentioned in Chapter One, neoliberalism, authority vs. agency, and aware civil society, can be impacted by individual efforts, as shown in several cases found in the literature review. These three problem areas are broadly based in society and have a multifaceted complexity that demands a pragmatic strategy.

In designing the curriculum for the online intervention, the characteristics of the working model are:

- It is grassroots and a free open education source via distance learning.
- It serves as a possible means to an end via an online presence for the continuing education support of a community of learners.
- Furthermore, it has built-in metrics and assessment tools to measure the successful preservation actions resulting from the students' output.

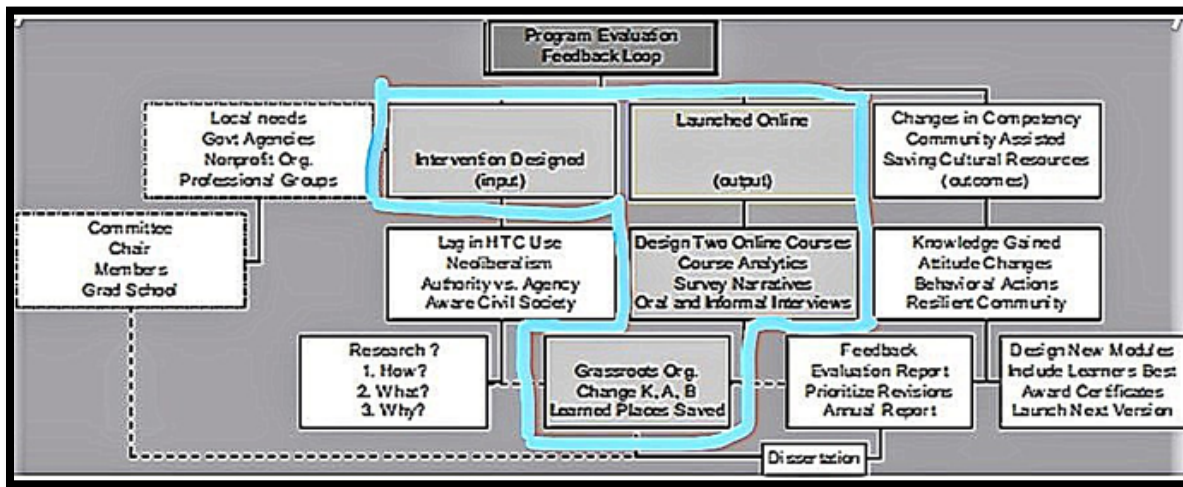


Figure 14. Feedback Loop Featuring Chapter Three, the Intervention

The educational philosophy relied upon for the course follows the belief that experiential learning or “learning through reflection on doing”¹⁷⁷ can help anyone construct knowledge. The service learner, by volunteering, can bridge the virtual online course and their chosen real-world setting. This way, anchoring the learning to a special place where the service learners’ experiences with the chosen cultural resource are the product of a socio-cultural phenomenological process.

The doctrinal rules-bound readings into the field of Cultural Resource Management will have practical meaning to the learner through their interactions with the community and the place in particular. The transfer of learning can occur through a haptic or hands-on approach. In addition, there can be an exchange between the virtual online readings to the phenomenon of the historic property’s characteristics in its setting through reflection with the community as a partner.

¹⁷⁷ John, Dewey. *Experience and Education*. New York: Macmillan Company, 1938. Editor Kolb, David. A. *Experiential Learning: Experience as the Source of Learning and Development*. Englewood Cliffs, NJ: Prentice Hall., 1984..

Counting on the learners' reflections of their experiences also aids the facilitator while assessing student outputs. The community can choose to take the students' achievements and use them to impact their local efforts. Taken altogether, the several cohorts' cumulative outputs that impact their chosen communities move toward achieving the course's ultimate outcomes of self-actualized preservation activities. Because practice is distinct from theory, when one engages with others and puts their learning to the test, the results are varied and differ temporally based on many pre-project preparations.

Where there are impacts in the local community that can go beyond the chosen cultural resource. The cumulative efforts' outcomes can be less geographically fixed on a place as it transcends the local and includes such factors as a more aware civil society that has taken agency over its future while conserving its heritage and considering the much broader, perhaps global outcomes, including the changes in participant's competency, attitude, and behavior serving as exemplars for future cohorts and incrementally impacting the effects of neoliberalism by these cooperative efforts.

Service learners who enrolled in the online course Saving Cultural Resources by Learning Places followed the syllabus IDEALS and could achieve the objectives while increasing their competencies, including knowledge, changes in attitude and behavior, and new skills.

Some competency gains include those required by the Secretary of the Interior's standards for professional qualifications. The NPS published Professional Qualifications as the statutory requirements for historians, archaeologists, architects, architectural historians, and others. An index of professionals and the Table of Qualifications Standards for the Core

Disciplines is found in Appendix C. For each discipline, there is a positive educational degree requirement. Also, there have to be two years of specialized experience in preservation work. The competencies gained from the online course by the volunteers plus the real-world practical experiences can be added cumulatively toward the two years' minimum requirement.

Participants self-enroll in the online course designed to impact the amount of preservation activity going forward. As volunteer service learners, they follow the syllabus in a tiered module design. Beginners can move from introductory levels of technical skills, mastered quickly, and progressively more subjective modules that require critical thinking; these adult volunteers construct their preservation education.

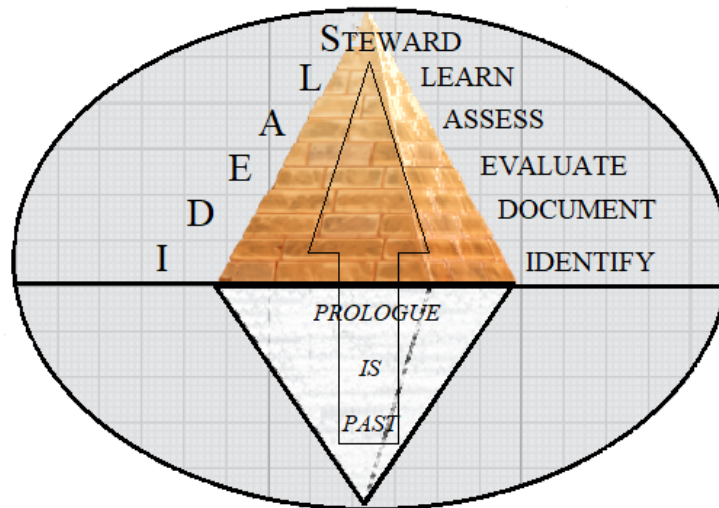


Figure 15. Tiered Pyramid IDEALS

The Learning Places syllabus's acronym or mnemonic is IDEALS. It encourages acquiring higher tiers of modules and builds up to a pyramidal apex labeled stewardship. The safe online learning community permits each volunteer the time and digital space to try new

concepts amongst their peers. Finally, they present their stewardship proposal to their chosen host community that needs help to save the cultural resources in their midst.

The course itself holds the means to build the knowledge and help change attitudes that can result in those behaviors that would be more conducive for a pluralistic society. As a grassroots effort of volunteer service learners, it is a permanent virtual space for a community of learners who can return for new projects that they want to adopt as they help local communities who choose to Save Cultural Resources by Learning Places.

Learning Places (LP) as an intervention not only conveys the theory; LP facilitates real-world experiential learning opportunities. LP facilitates the online public space for service learners who can invite others to engage with their chosen cultural resource. The cooperative aims for those in a cohort to form a community of learners who help each other's growth and changes. They take turns becoming the course moderator for a module or join smaller groups to develop new confidence and mindfulness of working with others like a team, as per the 'Tips' from Boettcher and Conrad's¹⁷⁸ seminal manual.

The overall objectives for the virtual learner as enrollees are an increase in their competencies. The stepwise method, pictured as a pyramidally tiered syllabus, is a construct of the six core modules. The learner builds new knowledge and technics (skills) that they use in each of the six tiers that lead to their praxis opportunity to demonstrate skill adoption from those technics offered in each module.

¹⁷⁸ J. Boettcher and R. Conrad, *The Online Teaching Survival Guide, Simple and Practical Pedagogical*, 2010. Boettcher, J., and R. Conrad. *The Online Teaching Survival Guide, Simple and Practical Pedagogical Tips*, 2010. The first stage was a graduate school practice course on Brightspace's D2L via the Montana State University's platform. The initial practice course followed the syllabus and text by Boettcher and Conrad¹⁷⁸ that was developed by Dr. Marilyn Lockhart, Program Leader, Adult, and Higher Education.¹⁷⁸ It enabled a test case to be run using the course both on campus and in nearby communities.

Finally, the facilitator/instructor will archive within the LMS, containing exemplary outputs for future cohorts to appreciate. The former cohorts' examples of best practices illustrate helpful tips for future service learners. In addition to my examples uploaded to the course, former cohorts' work can help newcomers' attitudes. They offer a template to inspire future work.

I.1 Learning Places Objectives

To measure desired changes in the participant's competency, employing content analysis recognized specific keywords per the six objectives. The following *italicized* words are those traits that can lead to desired objectives.

Initially, enrolled volunteers learned *ways to describe* the chosen historic properties they wanted to help using the course's technical lesson syllabus. Then, step-by-step, they *learned* the first four modules, *Identify/Inventory; Document; Evaluate and Assess*—the keywords here relate to objectives that build competency with each module.

The participants *created an online communal space to sustain productive ties* with their local community, other preservation partners, and other service learners' online cohort—the keywords here relate to objectives for attitudinal adjustments and behavioral change.

With help from the community, in-depth *descriptive* stories of the historic places were *learned* that built on the student's *research and mastery of digital techniques* for their *presentations*. During this module, they go from having *Learned to Lead*—the keywords here relate to objectives for skills building, attitude adjustments.

Eventually, the course volunteers chose appropriate stewardship recommendations using preservation guidelines that are feasible and comply with the Secretary of the Interior (SOI)

Standards.¹⁷⁹ The six-tiered modules lead to the ultimate capstone effort, stewardship. The students display newly acquired techniques, and their presentation shows signs of affective learning growth in their project's summative evaluation—the keywords here relate to objectives for knowledge gain, attitudinal change, and behavioral changes.

Promoting critical thinking strategies during online discussions and review comments that spark from cohort members' preliminary presentations results in cognitive presence. The enrolled demonstrate newly learned historic preservation best practices, media techniques, and skills—the keywords here relate to objectives: knowledge gain, attitudinal change, and behavioral changes.

'Power Learners'¹⁸⁰ or 'self-reliant students' are identified if they pursue extra credits made available via links to HPEF.¹⁸¹ Those extra credits of continuing education can be reported directly to the AIA for the members' transcript. Those HSW¹⁸² credits are in addition to the core course's possible self-reported twelve learning units (LUs). The learners can go beyond the annual required six LUs in a field exercise using re-photography and a character-defining matrix for cultural landscapes. *Keywords:* Knowledge gain, attitudinal change, behavioral changes.

¹⁷⁹ H. Ward Jandl and Carol Shull, "Preservation Tax Incentives: Past and Present Twentieth Anniversary of the NHPA," *Preservation News* 26, no. 10 (1986). Secretary of the Interior's Standards for Rehabilitation is used for grants in aid, and historic tax credits.

¹⁸⁰ *Power learners*—self-reliant learners, people who use reflection and a growth mindset to quickly adapt, learn, and take initiative to stay on track and personalize their own learning journey. [IREX - Investing in people. Inspiring change.](#)

¹⁸¹ Historic Preservation Education Foundation. HPEF has been a leading provider of historic preservation knowledge for architectural conservators and architects, tradespeople, building owners, students, and all those who care for and care about historic buildings.

¹⁸² Extra credit can gain 6 HSW Health, Safety and Welfare which counts toward the required continuing education credits by the states and the AIA.

I.2 Content and Flow of the Online Intervention

The course flow is like ascending stepped tiers of content organized into six modules that comprise the core syllabus—called IDEALS. A summary of the curriculum content and flow follows the acronym or mnemonic I for Identify, D for Document, E for Evaluate, A for Assess, L for Learn, and S for Stewardship. A more detailed description of each follows:

I is for IDENTIFY in Module One. The first tier, called IDENTIFY, begins the tiered syllabus as displayed in the pyramid icon. Each generation can look around their communities and begin the process of selecting those buildings that may be worthy of preservation. This effort has been underway since the earliest federal efforts to commemorate historic places and sites. A state-level register for historical places exists since the passing of the 1966 NHPA.

D is for DOCUMENT in Module Two. The learner relies on existing records found during the historical record's initial research. Using those readily available sources will aid in the modules that come next. Documents research can be fruitful from analog records such as the centuries of land grant and deed transactions found at county clerk-recorders, reference library sections for Sanborn Maps, Thomas Registers, all the way to the latest GIS spatial data found online and assisted by ESRI¹⁸³ or state cadastral surveys. Google Maps imagery and local historical society archives are diverse sources for researchers. Recording the historic site by photography, field sketches, and notes is another aspect of the module for DOCUMENT. The

¹⁸³ ESRI is the Environmental Systems Research Institute: The system provides an infrastructure for making maps and geographic information available throughout an organization, across a community, and openly on the Web. ArcGIS consists of the Arc Reader, which allows one to view and query maps created with the other ESRI products. The software also provides some basic tools for map viewing, printing and querying of spatial data. Arc Reader is available for free to download and it only reads ArcGIS map products. <http://appsforms.esri.com/products/download/index>

federal government began the Historic American Building Survey¹⁸⁴ during the Great Depression in the Thirties in conjunction with the AIA for employing out-of-work architects and keeping the recordings of historic sites in the Library of Congress.

E is for EVALUATE in Module Three. Evaluation criteria used to find the proper historicity and significance category can help future preservation efforts. Establishing whether there is a possibility for more study of the cultural resources occurs when placing value judgments on a property. If the initial evaluation during the third module indicates a high level of significance, more in-depth documentation will be required.

A is for ASSESS in Module Four. Assessing a building or a cultural landscape uses the online course's best practices. For assessing the conditions of a historic building, one typically starts with the roof and works around all facades and the foundation before turning toward the surrounding site and landscaping and the defensible space for wildfire safety. In the case of cultural landscapes and archaeological sites, ground-disturbing activity should be avoided. Assessments done at this initial stage uses techniques for 'reading a building' at three critical distances: first, from afar by considering the environs and overhanging trees, for instance; then second, at arms distance where one can discern rotting windowsills; and third, at the level of touch or closer using magnification, the characterization of in situ building material, called historic fabric, involves analyses of mortar mixes, wood species, paint colors, and ferrous metal roofing or trim. Finally, current conditions and past repairs need assessing for risks. Any likely

¹⁸⁴ HABS, HAER and HALS are three of the historic recording programs under the NPS Heritage Documentation Program (HDP). Summer teams still produce recordings by hand measured drawings and photography. <https://www.nps.gov/hdp/>

vulnerabilities or deficiencies get noted in field notebooks then transferred to a building condition report.¹⁸⁵

L is for LEARN then Lead in Module Five. The online intervention allows the service learner to display all digital data gathering and encourages uploading fieldwork products to a Google Sites cloud. As volunteers, the service learners will also rely on formal and informal interviews resulting in new oral history archives. Digital humanities techniques can be learned then practiced with the host community clients and their contacts. ‘Learn then Lead’ adds the narrative needed if the community decides to apply for the nomination of the cultural resource to the NR. The stories behind old photos and drawings will be valuable if annotated by the volunteer with community input. State and federal NR programs offer guides for completing the required forms, and an embedded NR nomination success is in the course readings. Local interviews can help determine original from replacement or additions to initial building mass or cultural landscape features.

Collecting valuable data helps in the last module of the course. With the unique information available through the narratives by elders of a community, the learner assumes a part of the final project report’s stewardship role.

S is for STEWARDSHIP in Module Six. A steward offers and acts on alternative preservation treatments for the community-based preservation of their cultural resources. The

¹⁸⁵ The online course has an embedded streaming video describing the innovative system for storing and retrieving the mountains of data that these field surveys can produce. Integrated Resource Management System was developed by my Division of Conservation in the NPS Southwest regional Office, and it relies on relational database apps using ACCESS and reports using the ARCGIS mapping for all facility attributes.

previous research in the first five modules of the course will affect the appropriate choices for the treatment level from amongst the many alternatives that meet the Secretary of the Interior's Standards. The learner's summative evaluation by myself as the instructor comes after the final project presentation in the sixth module. Again, the learner demonstrates acquired knowledge about the Secretary of the Interior Standards and the relevant guidelines.¹⁸⁶ The service learner's presentation of their thoughtful, appropriate, prioritized preservation actions final report to their host community is the final student output of the six-module-long core course.

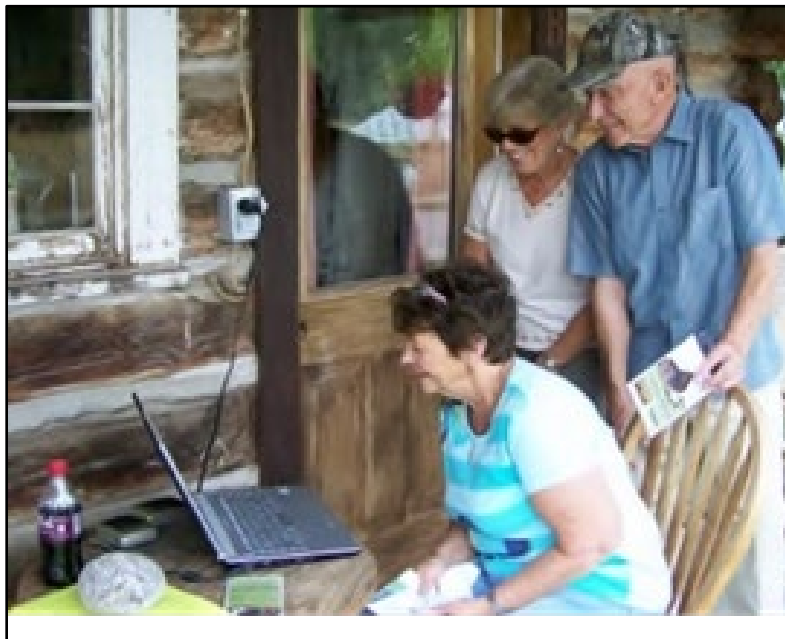


Figure 16. Historic Site Tour Participants View Online Course Precursor August 2013 at the Trapper's Cabin on the Sterling Ranch, Gallatin Gateway, Montana

¹⁸⁶ Embedded in LP are links to all of the Preservation Briefs serving as guidance. Also the link to the Illustrated Preservation Guidelines for SOI Standards is on the course list of reference material that is available via: <https://www.nps.gov/tps/standards/rehabilitation/rehab/index.htm>.

The *Standards for Rehabilitation* are the most used of the *four Treatment Standards* and are separately codified (with a slight difference in wording) as 36 CFR Part 67.7 as part of the [Federal Historic Preservation Tax Incentives program](#).

The *Standards for Rehabilitation* are regulatory for rehabilitation projects to qualify as certified rehabilitations under the tax incentives program, but they are also used at the federal, state and local levels to guide work on historic buildings; historic preservation and planning commissions across the country have also adopted them to guide their design review processes.

Part one summary recalls that the enumerated, desirable course objectives needed instruments for actualizing the theory in practice. An online course enables the transfer of learning from the enrolled service learners to their project partners in the community. As a result, host communities and their service learners can achieve the desired outcomes of more preservation activity and resiliency. The content selected for the online course is a distillation of the many facets of cultural resources management, especially when dealing with the historic preservation of the built environment.

The course curriculum flow follows a mnemonic or acronym, IDEALS, a uniquely designed structure for students to construct their knowledge in a stepwise manner as in the theory of scaffolding toward a penultimate level. That pinnacle of the pyramid of learning modules designed for the course is stewardship, and the learners' outputs exhibit the synergy of the volunteer, who acquires knowledge of the doctrine, his community, and the phenomenon of place.

Part II. The Curriculum: IDEALS

Completing the IDEALS curriculum leads to the Knowledge Gain, Attitudinal, and Behavioral Changes Necessary to Mitigate the Perceived Barriers for Historic Preservation Activity. In Part I of this chapter, the objectives list had associated traits italicized. Expectations of displaying those displayed traits act as indications of the transfer of learning efficacy through the participants' mastering of the online curriculum. The following recounts those measurable indicators:

1. Enrolled volunteers demonstrate new *ways to describe* and characterize the chosen cultural resource as they build competency through the four modules of Identify, Document, Evaluate, Assess.
2. Participants *created an online communal space to sustain productive ties* with their community hosts and the online cohort members in Module Five for Learn and Lead.
3. *Descriptive stories learned through research and mastery of digital techniques.* What has been *learned* prepares the service learners *to lead* the project from its preliminary report *presentation* to the online cohort through Module Six.
4. The learner's choice of the *appropriate recommendations* follows the *guidelines* and is both feasible and in compliance with the SOI Standards.
5. As cohort member discussants, they promote critical thinking strategies through their comments while reviewing the preliminary presentations. The newly learned best practices and skills with media techniques demonstrated the transfer of learning.

To ascertain each participant's achievements requires applying assessment instruments such as quizzes, assignments, discussion posts, and report presentations:

- Module One: A sample assignment for the first module is: Identify and Discuss Choice of Cultural Resource.
- The Discussion Post for Module Two: Document
- Module Three Evaluate Midterm Assignment: Criteria for evaluation appear.
- Assignment for Module Four Assessments.
- Assignment for Module Five, 'Learn then Lead,' asks them to become a project leader.
- Final Report: The report is the summative presentation to attract local civil society members to help save cultural resources in their midst.

As mentioned often in this dissertation, a goal appears to be most salient of the many I profess and is the one I labeled: “Aware Civil Society.” The chapter contains insights into the online course’s role in bringing about the changes envisioned for a more aware civil society serving as an introduction, and the reader can go to the website enrollment portal for the whole experience.¹⁸⁷

Abilities¹⁸⁸ or skills are other popular indicators for evaluations of many of the job training educational programs. In other fields, like health and community development, the use of “Knowledge, Attitudes, and Practices (KAP)”¹⁸⁹ surveys can include open-ended surveys, focus groups; methods combine observations and open interviews and help deepen topics addressed in the KAP survey,” according to the Spring Nutrition KAP survey¹⁹⁰ model.

The Learning Places course assumes that the adults enroll somewhat prepared because they come from the architectural profession, preservation, or cultural resource staff positions. The prior experience of a helpful volunteer will be reported initially through an online survey. Graduates of the course can re-enroll. Like the pre-course and post-course surveys and online analytics, some course design instruments can show the traits of participant growth and development of their K, A, B. The technical preparation for using the technology in the online course reported by the service learners needs to be gauged before, during, and end by instructor observations. Student progress through the online course can be customized based on prior experiences online and in historic preservation, allowing for extra credit or basic training.

¹⁸⁷ The online course can be enrolled in through this URL: <https://www.cascadianow.org/learning-places>

¹⁸⁸ Abilities or competencies are comprised of the three factors of K.A.B Knowledge, Attitude and Behaviors. .

¹⁸⁹ <https://onlinelibrary.wiley.com/doi/full/10.1002/oti.1398>

¹⁹⁰ KAP surveys information webpage:
https://www.springnutrition.org/sites/default/files/publications/annotation/spring_kap_survey_model.pdf

Working with others can be a boon for helping a beginner catch up with the others in the cohort's common digital spaces (ZPD). During the course, the student interacts with the instructor via quizzes, assessments, and midterm assignments. Each assessment has rubrics for grading the mastery of the information. When the learner applies the new knowledge by posting discussion comments with peers, they form a community of learners in a small group. In this way, they are constructing knowledge that will be more meaningful to the individual.

The completed pre-course surveys shared the newly enrolled learners' prior preparation based on courses and work experiences, both in historic preservation and online learning. Questions soliciting their likes and dislikes of the online educational delivery method and their past experiences using online learning appear on the survey. The expressed preferences gauging attitudes and intentions regarding historic preservation voluntarism were polled as well. The survey data can give the 'zone of proximal development' information before the learners engage with the course for the first time.

The pre-survey came with a request for a personal profile or vitae immediately after completing the enrollment. This information would help customize the course for the more advanced learners and the newcomers to preservation and online learning. In addition, this information provided demographic data as the enrollees shared their experience level and interests. Before these posts, the online learners of Learning Places signed a university research consent form.¹⁹¹ The pre-course instruments included an online survey launched via the SurveyMonkey provider asking entry-level questions, providing preliminary data for the instructor, and appearing in Appendix C. The online invitation link and excerpts follow.

¹⁹¹ Consent form link: <https://drive.google.com/open?id=13wrj6y2eYdstJ17VaaQ2qUNy-52WUfnljKvTS2FCSOQ>

The cumulative data from the survey will be very beneficial to the research analysis of the course's efficacy. Go to the SurveyMonkey link at <https://www.surveymonkey.com/s/SS5FPPV>.

The theories and guiding principles of historic preservation, architecture, engineering, and cultural landscapes are covered in the six-module syllabus, as shown in the following matrix.

The syllabus in the following chart is a snapshot from the course:

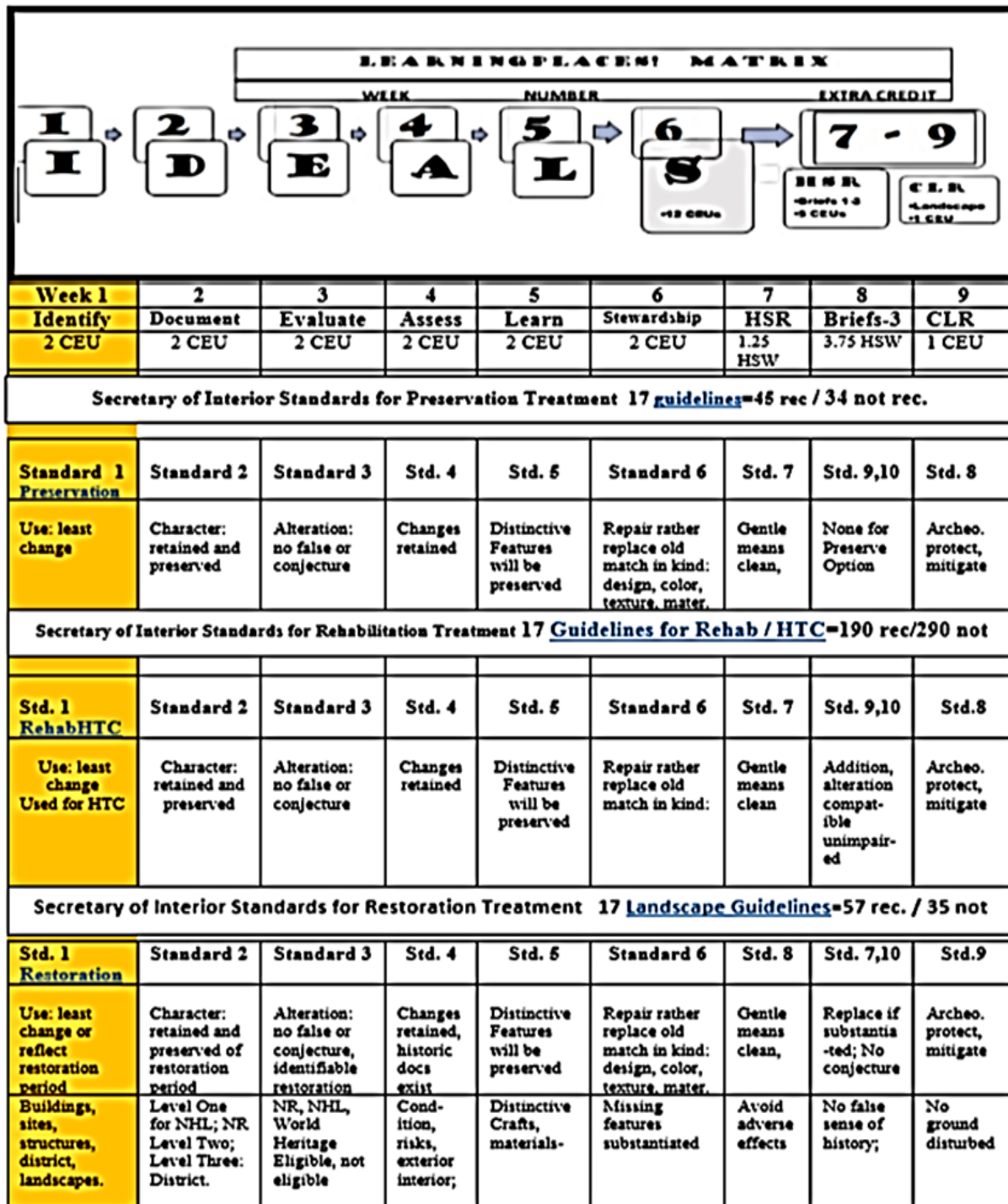


Figure 17. Course Matrix IDEALS

The matrix is a study guide for the syllabus with corresponding relevant pro tips about the Secretary of the Interior's Standards, which are vital to mastering the knowledge.

Whenever one plans to preserve a cultural resource that may be eligible for listing on the National Register and for qualifying projects to gain incentives from the HTC and other grants-in-aid programs of the federal and state governments, they must demonstrate compliance with the Secretary of the Interior's Standards (SOI Stds.)

The various formative evaluations planned for online learners are enhanced by the Canvas quantitative analytics, revealing the users' participation: numbers of pages opened, time online, and grades on the quizzes and discussion posts. The final summative evaluation uses rubrics applied by the instructor. Feedback from any community partners who interact with the service learner throughout the course's six modules length is solicited as well. The service-learning course will become the launching pad, so to speak, for developing a community of trust.

A survey through Microsoft Forms gathered their reflections and suggestions for change and the likelihood of repeating the course, or a new enrollment that can see a project through to completion in subsequent modules by repeat learners and new volunteers. After the course, the service learners completed an exit survey and asked what more they would like to see launched.

Appendix C contains questions from the exit survey.¹⁹²

¹⁹² Microsoft Forms survey template was used and is found at [Saving Cultural Resources by LEARNING PLACES! EXIT SURVEY](#)

Outline of Schedule	Topics covered	Assignments due
Early Period of this Course		Read assignments found in the course "Content" area
<u>Module 1 & 2</u>	Log in and obtain readings and reference materials	
	Scan the environment. Secretary of Interior's Standards Endangered Building List	Post your one – resume/introductions. Find your module by module rotation as Facilitator or Learner discussion area. Contact local community Topic Selection
<u>Module 3</u> 	Site Visit Inspection Investigation Research problems	Post discussions based on Module two readings Post your Project topic and its early findings, warts, and all. Midterm Assessment
<u>Module 4</u> 	Develop Solutions Test proposed solutions against Standards Find case studies to support approaches Graphical, photo / video documentation	Meetings on site Meetings online with groups to develop alternative solutions; search of literature for data and past Best Practices. Research methods of implementation to test efficacy of solutions.
<u>Module 5- 6</u>  <u>Extra Credit Modules 7-9</u> 	Propose Project Design Develop preliminary Power Point presentation Last Site Visit Final Project Reports Complete four lessons via links to HPEF and earn 6 HSW continuing education credits. Cultural landscape field exercise	Critique from class of Preliminary PowerPoint Presentation to Clients Self-assessment of delivery of project products. Online quizzes for each of the four AIA approved lessons. Re-photography and a character-defining matrix.

Figure 18. Online Course Snapshot of Syllabus Chart

The above chart is a snapshot of the online course. In Chapter Four, Methods, I compare each of the six modules with the topics covered and the assessment instruments related to that module's contribution to the learners' K, A, B. The table outlines the connections between (1) the module's content to (2) the relevant knowledge gained to (3) the related attitude and behavior changed to (4) describe what specific deliverable is used to assess how the volunteer proposes to help save the cultural resources they chose.

II.1 The Curriculum Reflects the Literature Review

Choosing the essentials to include in the curriculum was aided by the literature review. The literature informed the definition of the problems impacting Historic Preservation as a field and society in general. The three overlapping sectors of the Venn diagrams from previous chapters depict the areas of knowledge drawn upon when crafting a curriculum that will benefit civil society by increasing preservation activity going forward.

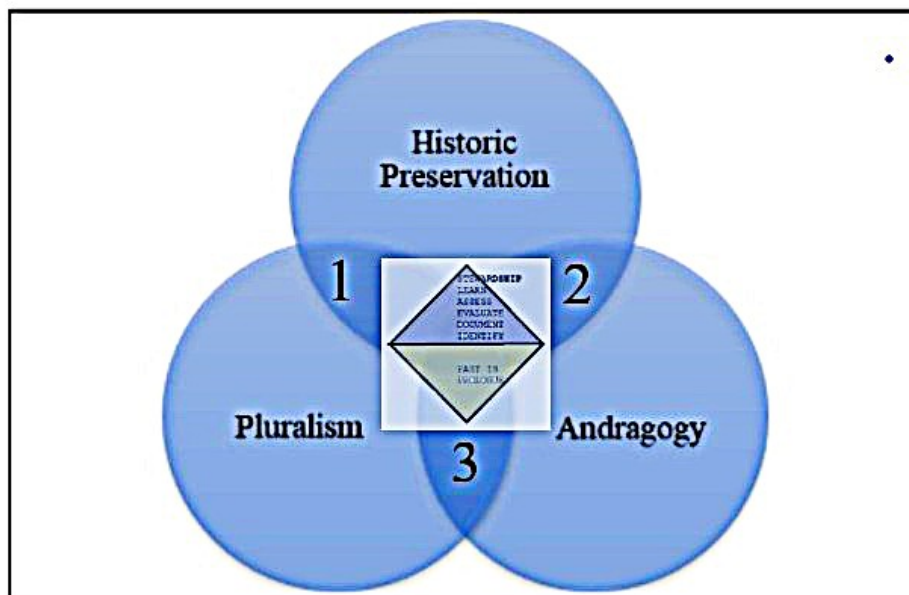


Figure 19. Venn Diagram of Historic Preservation, Pluralism, and Andragogy

1. Historic Preservation: can competency in the core practices of cultural resource management, historic preservation, in particular, serve the public history and American studies paradigm shift toward more diverse and generative sources of narratives from the full spectrum of America's civil society? Will striving spark more heritage awareness and conservation to mitigate the 'invisible hand' of Adam Smith's autonomous sphere and today's neoliberal marketplace?¹⁹³

2. Pluralism: are the concerns with public memory, sense of place, and the agency of the underrepresented reflected in the intervention? Can any instruments used in the online course by the community of learners help attain more desired outcomes? Will being a more inclusive and cooperative online grassroots effort increase the 'agency' people have over their past and future communities?

3. Andragogy: is the intervention designed using the best practices in online preparation for teachers of adult learners, e-learning, and recent preservation education?

II.2 American Studies: Historic Preservation Literature

After reviewing recent articles from the canon where preservation education and American Studies intersect, few prescription-like advice was noteworthy. Few directly offered information to rectify the three problem areas described in Chapter One. Neither the seminal works in American Studies nor those from Historic Preservation have answered the triple

¹⁹³ Stephen Metcalf, "Neoliberalism: The Idea That Swallowed the World," *The Guardian*, August 18, 2017. In 2016, "The International Monetary Fund put out a report that confirms there is indeed neoliberal forces in the marketplace. The paper gently called out a "neoliberal agenda" for pushing deregulation on economies around the world, for forcing open national markets to trade and capital, and for demanding that governments shrink themselves via austerity or privatization. The authors cited statistical evidence for the spread of neoliberal policies since 1980, and their correlation with anemic growth, boom-and-bust cycles and inequality."

concerns of neoliberalism's problems, agency vs. authority, and aware civil society. Public History's work in community-based heritage conservation for the inner cities and contested landscapes offers case studies that provide a model for some problems. The original NPS historic preservation guidelines and technical information were last updated in the nineties with colorful illustrations. However, as administrations of the federal government change and new congressional legislation shifts priorities, gains are lost, and only some regained heritage conservation efforts.¹⁹⁴ Less funding for education for the public's awareness of historic preservation, more central authority reviews stymying the community self-determination, the neoliberal agenda has doubled down calling for more growth by shrinking government cumulatively resulted in greater inequality. The literature is surfeit with narratives about the inequities affecting civil society.

There have only been forty years of heuristics for historic preservation fields guiding the professionalization of the staff, legislators, consultants, regulators, financiers, and investors of the rehab work eligible for the HTC programs. The official literature annually reports over \$40 billion invested and over 45,000 significant places in the HTC program. However, only 3% of those listed on the NR are sites related to the underrepresented minorities. More of the investors' funding could reach local heritage sites (the new opportunity zones have over 100 billion capital

¹⁹⁴ Congress has tried to do away with the HTC and at the last minute the committees managed to work back into the new tax reform bills in 1986, 2013 and 2017. Over forty thousand letters to Congress saved the HTC and it was renewed but weakened. The rules making efforts for meeting the Centennial reforms called for in 2016 by then Secretary of the Interior Sally Jewel have been handled most recently by the Trump designee for the SOI position. The revised rules were aimed at making the States and Tribal entities input minimums and reword designating historic districts to give more power to largest land holder. Federal agencies would be more autonomous from the States and Tribal consultation and the Advisory Council oversight. Perhaps the 3300 plus complaints received during public comment period made a difference. Only the National Association of Home Builders (140,000 members) wrote in favor of cutting the red tape and wanted it passed. This is what a pluralistic society engenders a discursive opportunity to voice one's opinion, then live with the judgment of the authorities afterwards. The Interior Department rules were overturned by the Biden Administration.

gains tax-sheltered and seeking investments since 2017). Poised for much more, the HTC is still a work in progress.

As in any public administration of aspects of civil society, there are cycles of policymaking and praxis that inform the field. Besides the rules of thumb or formulaic doctrines to guide the compliance reviews toward fair and equitable outcomes, there are punctuated episodes that rise with human passion about these objects of attention: the fragile cultural resources. Therefore, without an overarching vision for a particular project, there could be unguided energy and wealth spent without coordination with national program initiatives like the HTC and Historic Preservation Funds for grants-in-aid to states and localities.

The intervention design and the evaluation of its effectiveness can heed the social scientists' King, Keohane, and Verba's approach to causal inference that influenced the pilot year and the online course analysis Learning Places. In addition, their guidance to use skepticism and concern for overlooked aspects led to broadening the research to assess the course by using a wider aperture of view of heritage conservation's context in the UK and the US and other federal initiatives besides historic preservation.

King et al.¹⁹⁵ stated, "Causal inference thus becomes a process whereby each conclusion becomes the occasion for further research to refine and test it. Through successive approximations, we try to come closer and closer to accurate casual inference." Using skepticism in the course launch meant having to test the same online course syllabus over one year so that

¹⁹⁵ Gary King, Robert O. Keohane, and Sidney Verba, *Designing Social Inquiry: Scientific Inference in Qualitative Research* (Princeton, N.J: Princeton University Press, 1994).

six cohorts of volunteer service learners could try it out. In addition, there was an exit survey that was the first of, hopefully, many annual reviews of the program's efficacy.

Not sure of how much published scholarship within American Studies literature for the study area preservation activity, I did more searches and found Benjamin Flowers reported on the lack of rural preservation narratives.¹⁹⁶ However, there is ample evidence of public history work in other diverse settings for more inclusive heritage conservation. Funded by federal HPF and private sector rehab and reuse aided by tax incentives made the research frame wider so that the several states of the rural west could be studied comparatively, just as the underrepresented populations' research grants afforded such projects from the HPF grants. In addition, the community development specialists who work for the state's extension service agents are a source for working closely with rural communities.

The *Journal of Extension* had a handful of case studies that were concerned with historic preservation. The small number is about the same studies found in *Architect*, a journal of the AIA; the AIA University continuing education catalog of courses; the Kaplan study cards for the Architectural Licensing Board examinations; and most university curriculum in architecture schools without a track in historic preservation. Most scholarship and architectural practices leading to case studies tend to be in metropolitan areas and rarely travel out to the hinterlands.

Montana State University has been traveling with the Community Design Center outreach since the eighties, but there is little in published articles in journals or the popular

¹⁹⁶ Benjamin Flowers, "Historic Preservation." In *Encyclopedia of American Studies*. (Baltimore, MD: Johns Hopkins University Press, 2018). <http://eas-ref.press.jhu.edu/view?aid=8> (.).

consumption resulting from serving the far-flung rural communities.¹⁹⁷ Fieldwork can lend an ethical shift for outreach programs that adds authenticity, therefore, significance when the community is engaged. The recent annual meeting via virtual online means of the Vernacular Architecture Forum had speaker Elaine Stiles describe the values of fieldwork.¹⁹⁸ It fosters those narratives by populations that have been historically silenced, thus yielding alternative histories. Every land grant university has a mandate that can allow it to expand its assistance outward so cultural property traditionally hidden by marginalized minorities can be seen as part of their living community. Rather than being seen as artifacts with curatorial value, the shift, according to Stiles, “community engagement fosters alternative histories.” Fieldwork could recognize the continuity of use and identification with natural and human-made places. Traditional Cultural Property (TCP) is recognized internationally by UNESCO as embedded in the materiality and the cultural context in which it is found. The recognition of human associations and memory of place and use of those special places are as important as the typology and integrity of the extant material artifacts. What used to matter more than any other factor was the remaining integrity as in the original or historic fabric that used to be all that mattered to the authorities overseeing the National Register listing applications. Many sites associated with major developments in civil rights movements were not recognized for over fifty years and had lost much of the Sixties period appearances. Authenticity has to be given more weight in those cases.

¹⁹⁷ During the Great Society emphasis of funding the inner cities a model of cooperation between universities in urban settings and nearby areas described by their disadvantages as poverty stricken enabled more research and collaborative reports while I was an undergraduate studying in West Harlem’s Hamilton Heights, NYC. Ironically the area was the rural setting for Alexander Hamilton’s Grange or farmstead where I returned to rehab one of the few remaining wooden post-colonial era structures.

¹⁹⁸ The annual conferences of the Vernacular Architecture Forum: <https://www.vernaculararchitectureforum.org/Past-conferences>

The discourse in public history about professional historians' role and their community work with other social science and humanities scholars showed the most parallel activity or were spot on with the dissertation's directions. The work in community participation in democracy and public policy, combined with new online outlets or, as sometimes portrayed, portals-for-learning, may lead to a more aware civil society as they increase their involvement in saving cultural resources.

There is a critical need for each generation to assume the role of stewardship. New technology is needed to bear on the older unsolvable problems of heritage conservation. Current conservators express a reluctance to make irreversible changes in keeping with international charters of acceptable practices. When dealing with antiquities that require more techniques than currently invented, their guiding principles are to leave it alone to allow a future generation to have a tech-assisted breakthrough for the least destructive or invasive procedure to be applied.

That optimism about future technological advances can prevent any harm by an act of commission and should not be considered an act of omission due to negligence. Hopefully, the antiquity passes on to the next generation, without more damage to the conditions than when their ancestors originally bequeathed it. In their own time, the ancestral people of any culture who once cared for their cultural resource hoped it could be sustainable. Saving artifacts—that are significant to an ancestral heritage and way of life—if retained for the appreciation by their posterity is the fondest hope of predecessors.

This awareness carries the gravitas of fragility and irreplaceableness to those given the job of stewardship. Another way to explain the ethos could be to think of CRM in its broadest sense, where everyone has a role to play. Under the broader tent of CRM, all are welcome to

conserve their cultural heritage in their most appropriate and sensitive way using prescribed preservation techniques. As I call them in the online course modules, technics are those techniques, including those treatment measures implemented as a part of a broader heritage conservation plan. A broader plan that begins with a philosophy for the project endeavors to use the best practices that would be more inclusive of alternative world views. The paradigm shift for inclusivity would place those participating community members, consulting experts, and government authorities on an equal footing.

Part III. Pluralism

The second literature review covered topics on pluralism rich in describing the issues stemming from the economic imperatives, namely neoliberalism in today's parlance or *laissez-faire* during the Gilded Age. In the span of six modules, the service-learner moved from seeking continuing education credits to being the volunteer who comes from the locality and returns home again to gain the community's trust. They continue involvement in the Learning Places online community hybrid approach of online and face-to-face learning to avoid those reported shortcomings of a strictly virtual course for those engaging in community participation or public administration. For example, in the online education of future candidates for Master's of Public Administration, Austin's article asserted that distance learning avoids face-to-face classroom possibilities for simulating public contentiousness during the give and take of practice within a pluralistic society.¹⁹⁹

¹⁹⁹ Eric K. Austin, "Limits to Technology-Based Distance Education in MPA Curricula," *Journal of Public Affairs Education* 15, no. 2 (2009): 161–76, www.jstor.org/stable/40215847.

One of the few recent books offering prescriptive fixes for the preservation field's future released in 2016 for the fiftieth anniversary of the NHPA was called *Fifty Ideas for the Next Fifty Years*. The editors and authors offer changes that could lead to a more inclusive administration of the original legislation because the old-line exclusivity hung like a cloud over the current practices of the National Register process and listings. The issues were closely related to all of the three problem areas identified earlier. In particular, inclusivity concerns the authority vs. agency of community problems. In addition, many of the authors contributing the fifty ideas in fifty short chapters offered suggestions that influenced the design for a new online course intervention.

Max Page and Marla Miller suggest that the challenge “for the next fifty years is taking the proven benefits of preservation to scale,” but how “can we make this happen more easily and more often?”²⁰⁰ These questions could be answered partially through a methodical design to analyze the efficacy of the intervention tested in this dissertation. The National Trust²⁰¹ categorized its most extensive survey results into many statistically relevant ways to launch a new initiative for more relevance to diverse publics going forward. The survey data analysis offered insights into who might be a future donor, volunteer but not donor, or merely a social media viewer.

City demographic studies show that profiles have changed radically since the oldest residents, who were aware of the fight to save their historic district, began to be replaced or worse displaced by the newer, younger, wealthy, and less diverse ‘hipsters,’ a term used by more

²⁰⁰ Max Page and Miller, *Bending the Future : Fifty Ideas for the next Fifty Years of Historic Preservation in the United States*.

²⁰¹ National Trust for Historic Preservation, n.d. <https://savingplaces.org/>.

than one observer of gentrification.²⁰² This phenomenon is perhaps a study in the local manifestation of global neoliberalist prosperity on a granular level.

Displacement surges dramatically during boom cycles with the influx of younger, wealthier, and less diverse people who buy up formerly ‘fringe or redlined’ properties. The San Francisco Bay Area’s Mission District²⁰³ and Oakland have had Hispanic and Black population displacement from Silicon Valley commuters and other arrivals booms of the dot.com and later recoveries. Tenants and affected business owners formed community defense lobbying efforts. Spurred on by real estate operators, the quick turnaround criticism affected public policies and provided renters with new protective laws. Identifying areas undergoing changes, whether in the *barrios* or resorts in rural areas, where amenity-seeking retirees or new wired techno-entrepreneurs choose to live, can follow a historical ecology model. In Napa Valley, a historical ecology atlas was a study, with community support, due to the many overlapping uses and newcomer versus old-timer conflicting views and aspirations. Having a baseline of what constitutes the character-defining features of a desirable rural area can serve many planning and community-building meetings. The beneficial potentials by the new mix of residents, whether they are the typical amenity-seeking urbanites who move to exurbia or young families seeking

²⁰² Donovan D. Rypkema, *The Economics of Historic Preservation: A Community Leaders Guide*, 2005..

Gentrification has been reported by the Economic Innovation Group (EIG)²⁰² as a 3% problem nationwide. That could amount to 9m people displaced by gentrification. Place Economics has debunked the notion that HP causes prices of real estate to rise and rents follow suit. See Note 273: by Cheung for the counter argument in Avrami’s book, *Preservation And Social Inclusion*.

²⁰³ Sidney Cespedes, “Mission District Case Study,” Community Organizing and Resistance in SF’s Mission District (Berkeley, Calif: Center for Community Innovation, University of California, June 2015), <https://communityinnovation.berkeley.edu/>. <https://communityinnovation.berkeley.edu/>.

The late 1990s. The result of this rapid speculative growth was an increase in the cost of living and a rise in the cost of housing in the Mission, which led to the displacement of longtime residents. The changes experienced by the Mission during the dotcom boom are those typically associated with the traditional conception of gentrification, or the influx of investment and higher-income, usually White, residents to areas with low-income, often minority, residents.

small town and nearby outdoor recreation they could find common ground to establish limits to sprawl. Building in remote off-the-grid places can lead to demands for public services externalized to the taxpayers instead of those property owners choosing seclusion. I did an article for the local history museum quarterly about a 150+-year-old Trappers Cabin that did not have indoor plumbing until the current occupants moved in during the 1970s. That was a long-needed upgrade.

Today, exurbia surrounding denser communities has more cellular communication towers planted than a replacement for trees. In the Trapper's Cabin vicinity, a community grew up in the exurban fringes that chose to defeat a school bond for the town's 1914 schoolhouse. The newcomers had no connection to the school like the locals whose grandparents and grandchildren attended the historic community landmark. Due to a gap in communication between old-timers and newcomers in this iconic rural area, no common ground came to the fore to make the school safer and meet current building codes.

This disconnect can lead to neglect for community infrastructure and the narratives and artifacts that lend substance to public memories. Learning Places puts the volunteer under the guidance of the local elders and then teaches to others what has been learned from the oral history that adds meaning to the form and activities occurring in the special places they chose to help save.

A case in point in San Francisco revolves around a similar problem that has become ubiquitous in small amenity-rich western rural areas and neighborhoods that were once on a fringe of urban desirability. Both instances have brought out the critics who decried the marketplace's erasure of old values. Gentrification has rearranged the public memory of places.

Place-name makeovers disrupted wayfinding orientation. However, to San Francisco's credit, they protected the bar/restaurants and retailers' from evictions and successions. Their rationale for supporting the old businesses was their belief that the gentrification was another fallout from the inevitable progress and prosperity cycles (or boom and bust phenomena of a capitalist economy).

As in Adam Smith's²⁰⁴ theories, the 'invisible hand' is unchecked by the free-marketeer attitudes that prevailed in 18th-century capitalism and ever since. If left to the unregulated free market, everything would presumably trade at whatever the market 'price' alone determines. As in a laissez-faire political economy, everyone was expected to behave according to their self-interests. Consequently, current neoliberalism also reduces all community values into a price-driven social media-influenced algorithm without the costs of the externalities (i.e., the cost to the displaced older, poorer minority residents) paid by society.

For decades, the young, urban professionals (formerly labeled YUPPIES) took up residence into the frontier fringes of urban real estate, initially seeking affordability but unwittingly disrupting—at the pace of one household at a time—those existing social networks such as small businesses keeping older neighborhoods from rapidly changing. If there is an en masse influx of newcomers, who occupy the historic district's contributing historic properties, then take the community life for granted or ignore it altogether, then little may be left of those historical values in short order. What may have qualified these special places for the National Register's listing can easily be wrecked in the name of renovators' upgrades.

²⁰⁴ Adam Smith, *The Wisdom of Adam Smith* (Indianapolis: Liberty Press, 1976).

Anyone watching HGTV can watch shows of quick flip real estate operators whose first move on a property is to demolish a passé or functionally obsolescent feature that had survived up until there was higher income ownership with much more discretionary money to spend on luxury and comfort. The result of not knowing the history of historic preservation as a movement or the changing neighborhoods' cultural heritage can consequently cause the prosperous newcomers' detachment to trigger the official delisting from the register if its integrity reduces coincidentally. Delisting can follow neglect or acts of commission that abrogates the stewardship responsibilities of civil society.

These disconnections can breed apathy, complacency, or worse, intolerant discrimination. Those who choose to relocate to those places that offer amenities, such as those retirees or younger tech-savvy, work-from-anywhere, entrepreneurs usually look for, there can be situations susceptible to 'newcomer' or new west conflict with those old-timers in the traditional lifestyles such as stock-raising, grain or hay farming, and mining. In very short order, intense new developments can eliminate all of the heritage structures on a rural farmstead or carve out an unsustainable niche in the sensitive ecosystems in the higher mountainous life zones used by ski resorts.²⁰⁵ In the historic towns where new transplants may not know they live in hard-fought battlegrounds, creating a historic district can sometimes get crosswise with those preserving the neighborhood scale and sense of place. In some preserved historic districts, where only two

²⁰⁵ Ian McHarg helped a small Vermont town plan for an invasion of ski resort development. This led to using his approach to find those sensitive areas that one cannot build on and also zone those that can sustain development. Vermont passed an Environmental Law 250 that precludes higher than tree line mountain ridges from developers. The same concern is not evident in most Western ski resorts where the higher you can buy a lot for a chalet the higher the cost of the land and the environmental impacts. Realtors say that being able to look down on everyone else is a common trait for the richest buyers.

generations ago, a burgeoning social movement prevailed over the urban renewal coalition that lobbied for state-sponsored destruction, the new threat can be the indifference of gentrification.

The founding times of the national preservation social movement engendered inner-city solidarity in New York City when led by notables like Jane Jacobs.²⁰⁶ The ladies in tennis sneakers became an army of protestors who prevailed against the urban renewal juggernauts. After saving the SOHO Cast Iron District in Manhattan, the movement replicated itself in other older cities' ethnic enclaves. Jane was ahead of her time, and despite her opponents' defamatory insults during the anti-war protests that caused her to move to Toronto, her ideas proved correct that "saving, reusing, and retrofitting old buildings is a good thing."²⁰⁷

The online course includes content and techniques for more citizen participation that is amenable for trends toward e-democracy. For example, more discourse using online forums to make public policy decisions at the granular level could help save historic properties or districts. In addition, the online community encourages more grassroots paradigms that would be the new stewardship model. These shifts can alter the trajectory of neoliberal agendas and the envisioned problem-solving outcome of Learning Places.

Without knowing the causes and context, we cannot fully understand the outcomes we perceive a century after building a community or a landmark. To fully assess a proposed rehab plan's effects, the online service learners need to weigh many minute details. What may arise a century later is part of Learning Places forecasting the long view. When new owners take possession of historic properties and districts, they need to know much more about its inherent

²⁰⁶ Jacobs, *Death and Life of Great American Cities*.

²⁰⁷ Max Page and Miller, *Bending the Future : Fifty Ideas for the next Fifty Years of Historic Preservation in the United States*.

values other than the neoliberalist's prime characterization—the price. They need to know what has passed for repairs and restoration treatments in the past; the proposed type of occupancy as well as the past levels of consumptive uses; the behavior of new building material in close combination with old; the original mortar mixes, paint color and type; and a thousand other details. It is in this vein that the dissertation title ends with *Learning Places*.

The online course asks for the most inclusive of data gathering and research with key informants. Perhaps, this inclusivity will counterbalance the usual narrow American partisan projections of an ill-informed electorate. Basing beliefs from the earlier mythical presentations can begin a discourse about exploiting the disadvantaged and capital versus organized labor problems.²⁰⁸ Over-consumption of the biomes keeps an ecosystem sustainable, and the need for price support to those investing in the extractive industry and stock growing and grain production is a universal concern.

In this way, historic places' nominations for the NR can be written more universally than just the shadows from the environmental historian's declensionist narrative. McLaughlin urges that "an extra effort has to be made to counterbalance the declensionist in our histories. That is something we should all keep in mind regularly."²⁰⁹ It also adds richness to the narrative layers of data for the nominations of historic places and their interpretation for the public's edification and appreciation. Finally, it can lead to more pride of ownership for the often characterized as shallow consumers in the age of social media and virtual lifestyles.

²⁰⁸ Patricia Nelson Limerick, *Legacy of Conquest: The Unbroken Past of the American West* (New York: W, n.d.).

²⁰⁹ Mark McLaughlin, "Counterbalancing Declensionist Narratives in Environmental History," *Network in Canadian History & Environment, NICHE*, (February 3, 2016), <https://niche-canada.org/2016/02/03/counterbalancing-declensionist-narratives-in-environmental-history/One>.

Part IV. Andragogy

The best practices in adult education influenced the design of the online intervention to prepare willing service learners. To research the potential impact of this online course for a trial year required volunteers. Volunteers enroll to try the new course for several reasons. One reason offers something for the learners' self-interest, continuing education credits needed for license renewal; another reason can be that it is a way to pay back their hometown community if they feel a sense of civic duty. In this way, the course's intentional design determined if the intervention could help adjust attitudes about lifelong learning for heritage conservation.

The online open education field's literature review gave answers from various sources that continue to show promise after the trial year in which six cohorts enrolled. Making continuing adult training courses more accessible and inclusive, even in the most remote places, has been improved. Some problems are unique to the rural Western states that are sparsely populated areas where remotely located residents without access to the internet would need to travel away from home to nearby Wi-Fi hot spots, like libraries, to access the internet to work the online course asynchronously.

There are few commercial vendors of online courses serving the license renewal requirements for architects and engineers. Most vendors offer the manufacturer's packaged presentation to specify building material and equipment as courses for nothing or a small fee. There were practically none for continuing education in historic preservation. Even the continuing education university at the AIA has had only a handful of courses about luminary architects' history and their signature landmark buildings. Recently, a few preservation-related topics have appeared in different vendors' catalogs of courses that customarily were held face-to-

face, have now gone to prerecorded webinars and Zoom meetings. The centralized location of the various course contents benefits the users and could result in re-enrollment, as Learning Places' experience has shown in its test year online.

Therefore, an intervention that recognizes adults' need to have agency over their construction of knowledge will serve them best. This section speaks to the agency vs. authority problem impinging on community-based preservation activity. The motivated learners' final reports accumulate into a Learning Places virtual archive of exemplary independent case studies is perpetuated for the research community and future cohorts of service learners. Perhaps an archive by independent preservationists through Learning Places could aid the mid-twentieth-century modern architecture social movement (DOCOMOMO²¹⁰) and, in doing so, reinvigorate other twenty-first-century practitioners toward more voluntary activism for the sake of American heritage conservation that begins at the local level, even the familial historic rural agricultural legacy.

If fully surveyed, the rural Western states have ancestral places that could serve as the nearby examples to help advance the work on an aware civil society's problem area. Since increasing awareness is a learning process, there needed to be a teaching philosophy to guide an intervention's design. Constructivist theorists are most aligned with my learning style and are the primary philosophical underpinnings for service learners who volunteered to work on an existing cultural resource with host communities. Tempering the experiential approach by knowing the volunteer learner's preparation stage keeps a cohort working on pace. Therefore, educational

²¹⁰ Docomomo International is a non-profit organization whose full title is International Committee for Documentation and Conservation of Buildings, Sites and Neighborhoods of the Modern Movement.

theorist Lev Vygotsky's counsel for working with the student at their level of preparation, called the 'zone of proximal development (ZPD),²¹¹ influences the pre-course survey questionnaire and the stepwise syllabus. Student progress through the online course can be customized based on prior experiences online and in historic preservation. The intention is to meet the adults wherever their current technical preparation level happens to be.

For the later phases of the intervention, the service learner transcends roles and becomes a leader of the project proposal that is in the final report for the course. For that step, it is crucial to know their teaching' presence' amongst their host community. Each service learner is meant to assume the role of informal teacher and can handle the technology of the Canvas course and then convey their final report digitally to the community, perhaps using Zoom or WebEx communication tools online. Therefore, my research into the teacher-in-training preparation model can help place the learner on a spectrum informed by an innovative Venn diagram illustration for the Technological Pedagogical Content Knowledge (TPACK) model. The Lux and Waterton²¹² article assisted my inclusion of the model initially conceptualized in 1986 by Lee Shulman (Pedagogical Content Knowledge model). Koehler and Mishra built upon the PCK model in 2009, calling the enlarged framework TPACK. Their model is illustrated as a Venn diagram below. The acronym TPACK relates three types of knowledge that help in teacher

²¹¹ Vygotsky, *Mind in Society: The Development of Higher Psychological Processes*.. For the technical and content preparation literature for teacher education see discussion later in chapter for TPACK

²¹² Lux, Waterton, and AW Bangert, et al, "The Development of an Instrument to Assess Preservice Teacher's Technological Pedagogical Content Knowledge,"²¹³ "TPACK according Dr. Lux: could be argued to be one of the most influential frameworks for thinking about technology in educational spaces, By considering the service-learners in the Learning Places course as assuming a leadership role in Module Five as educators they will need to be able to develop their technological knowledge using the online platform and resources, pedagogical knowledge (how to then teach others about the historical preservation and tax credit content), and the content knowledge (the historical preservation and tax credit knowledge), and most importantly, negotiate the intersection of all three knowledge domains (the crux of the TPACK framework"

training and can be adapted to helping the service learners who Learn then Lead in Module Five of the course. The three knowledge types are content knowledge, educational technology enhancement knowledge, and pedagogical knowledge, which becomes the acronym TPACK.²¹³

Although there are advantages to digitally presenting to a community far from the service learner, according to Lux, “Using technology for learning is not a panacea for all barriers to constructing knowledge” because there are unsolved systemic issues in society. In the syllabus developed by Lux, “major issues impact[ing] the use of technology in education like access issues/digital divide, rural settings, one---to---one laptop programs, cyber-ethics, and safety.”²¹⁴

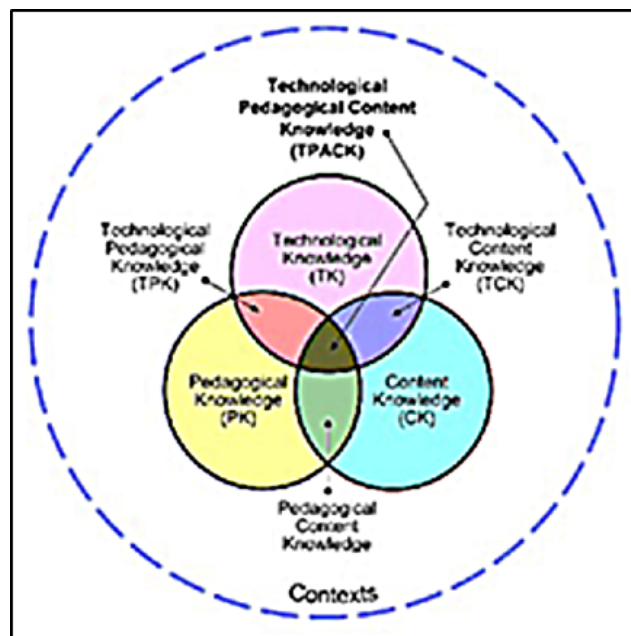


Figure 20. TPACK

²¹³ “TPACK according Dr. Lux: could be argued to be one of the most influential frameworks for thinking about technology in educational spaces, By considering the service-learners in the Learning Places course as assuming a leadership role in Module Five as educators they will need to be able to develop their technological knowledge using the online platform and resources, pedagogical knowledge (how to then teach others about the historical preservation and tax credit content), and the content knowledge (the historical preservation and tax credit knowledge), and most importantly, negotiate the intersection of all three knowledge domains (the crux of the TPACK framework”

²¹⁴ Lux, Waterton, and AW Bangert, et al, “The Development of an Instrument to Assess Preservice Teacher’s Technological Pedagogical Content Knowledge.”

Where the three segments overlap at the center is TPACK. The syntheses of TPK, TCK, AND PCK. When combined, these competencies are the ultimate goal for preparing teachers-in-training and others who learn and then lead.

Service learners in the course will find this helpful when working through Module Five of Learning Places. In addition, I found it helpful in the formative evaluation of the service learners when they first enroll, complete a pre-course survey, and list their experiences with online learning (the technology component of TPACK) and content knowledge in historic preservation.

For the later phases of the intervention, the service learner transcends roles and becomes a leader, and it is crucial to know their teaching' presence' amongst their host community. Therefore, a teacher preparation model can help place the learner on a spectrum informed by the innovative Venn diagram illustration for the Technological Pedagogical Content Knowledge (TPACK) model. The intervention called Learning Places is counting on the growing use of technology for e-participatory democracy. The dependence on technology during the pandemic is encouraging if not yet an accepted and reliable means to connect with others.

Until there is more civic consciousness and more citizens' participation, the role of technology is almost a moot point. It is the hope that everyone can feel empowered to step up to save cultural resources, and the online course can offer competency-building lessons in the syllabus. Usually, public planning hearings are done in person and take most of the evening for concerned and busy citizens. However, to access a channel for remote communication and acquire information for the give and take of small-town democratic procedures is now available to anyone with a fast and reliable internet connection on their smartphones or home computers.

In this way, people can express opinions virtually. For planning and architectural and engineering (A&E) designers,' the virtual collaborative projects means they can share their visualizations, floor plans and construction documents on a screen that can also be downloaded in smaller scale hard copies or enlarged by projectors for large conference room displays. This interaction is why the government requires building design software to use compatible codecs and drafting conventions readily available from resellers of the software applications. Known as Building Information Modelling (BIM),²¹⁵ it has become the standard practice.

In the Learning Places course, the service learners are encouraged to use the free applications from providers like Google. The service-learner sets up their own Google Site to view and make community decisions for proposals. There are examples embedded in the course for students to emulate using strictly virtual methods. The community discourse, enhanced by visualizations using computer-aided drafting software (CAD applications) and streaming videos, saves time and travel. In this way, those existing skills that service learners bring to their projects can be the foundation for community outreach. Canvas LMS enables access by smartphone or other mobile technology. Design of presentation will be considered the most efficacious appearing graphics for proposals and accommodating if enhanced by ADA required alternative narratives, so the report is reviewable by anyone with a link even while on the go.

Synchronous meetings online have been used extensively by schools, families, and businesses for the time being because of the novel coronavirus pandemic precautions. In

²¹⁵ The [Associated General Contractors of America](#) and US consulting firms have developed various working definitions of BIM that describe it generally as: an object-oriented building development tool that utilizes 3-D modeling concepts, information technology and software interoperability to design, construct and operate a building project, as well as communicate its details.

addition, remote learning/conferences rather than in-person classrooms offer the content, albeit by viewing lesson proceedings asynchronously.

Crowdsourced citizen videos now serve as eyewitness accounts that report from wherever the action may be happening. In addition, the enrolled service learners can learn and lead presentations with their host communities, as required for the online course's final report, and include the archival documentation with locally acquired imagery if uploaded to the project website.

Since the Reagan administration policies of smaller government and more privatizing of the role of public agencies to satisfy more of the public needs, there have been shrinking budgets and staff. None of the domestic programs increased while constantly increasing the Defense Department share caused the federal government retrenchment over the past thirty-five years. Combining those scarce outreach dollars for HP with the popularity of open educational higher-ed and expansion of popular job training sources during the shutdowns of the pandemic could mean a burgeoning market share of online service learners. Increased demand for online learning has taken up more of the bandwidth on the internet. Even broadcast television networks used the internet for viewers to learn more about the details of a breaking story. In addition, public television has been recruiting lesson plans from educators to share with any K-12 teacher to use in the classroom via streaming technology.

Learners can share their life experiences by creating online courses using the same learning management platforms that directly brought their adult education classrooms to their digital devices or 'smart' televisions. These advances can become even more readily accepted technology aid than the advent of broadcast journalism via television. Will it help make a more

aware civil society more so than TV has done in seventy years? CBS TV and radio journalist Edward R. Murrow predicted of television, “The instrument can teach, it can illuminate. Yes, and it can even inspire. But it can do so only to the extent that humans are determined to use it to those ends. Otherwise, it is merely lights and wires in a box,”²¹⁶

The methods, as described in the next chapter, help in answering the research questions. The mixed methods of assessments and evaluations of the service learners’ outputs considered the interventions’ assessment instruments. Chapter Four contains the step-by-step methods employed to date, and Chapter Five contains the analysis of available sources of feedback, along with information gathered by the surveys mentioned above and key informants’ oral interviews. The research questions raised for this dissertation are common to the conundrum facing other organizations engaged in preservation today and its future support base in civil society.

²¹⁶ IMDB quotes by Edward R. Murrow <https://www.imdb.com/name/nm0615386/bio>

CHAPTER FOUR

METHODS

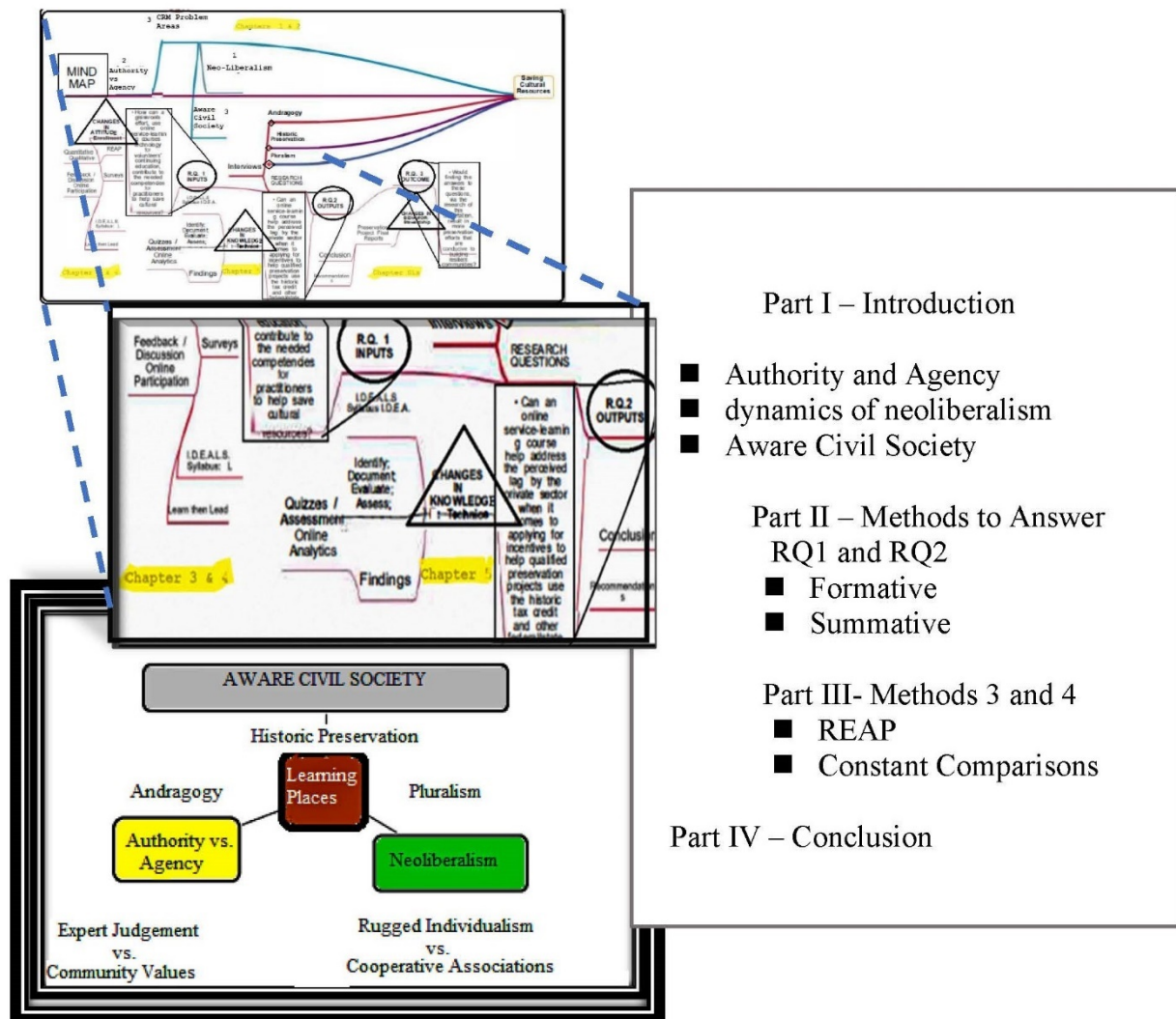


Figure 21. Mind Map Chapter

Part I. Introduction to Methods

The methods described in this chapter were selected, designed, and implemented to answer the research questions as informed by the scholarship in the three fields covered in

Chapter Three, literature search, Andragogy, Historic Preservation, and Pluralism. The goal is to find methods to promote the intervention, disrupting the problems-causing factors by alternative paths toward more resiliency by helping save cultural resources. Figure 21 above shows the layers of relationships of the triad of problems—literature reviews informing my dissertation—for the goals: more preservation activity for a more resilient community in the future by learning places from the past.

Part II recalls the two methods for method one, a formative evaluation of how the program functions, and Method Two, summative assessments of the impacts or outcomes of the program evaluation. Briefly, the two evaluations provide data helpful for improving the organizational capacity in the formative tools used known as Organizational Capacity Assessment Techniques²¹⁷ by McKinsey and the advisory feedback using surveys before launching the online course called Learning Places. The summative evaluation assesses the participants, all volunteers, gains in knowledge, attitude, and behavior due to completing the modules in the online course described in Chapter Three as the intervention.

Evaluations described in this chapter test the program's capacity as an organization, informing the design based on the results of the formative evaluations and gauges the level of competency changes by the service learners' as a result of their participation in the intervention using Method Two, summative assessments of the impacts or outcomes of the program evaluation. Student outputs in the context of the professional community in a selected study area offer multiple observations that were evaluated online, before and after enrollment in the course.

²¹⁷ Organizational Capacity Assessment Techniques originally supported by McKinsey is no longer available online.

Part III describes two methods that required many observations of participants and data analysis of the HP field activity.

The methods used traced the practical consequences of an educational program of learning for adults continuing education. The first method, a formative evaluation and program function assessment, is informed by a literature review of the work by Posovac and Linfield²¹⁸ and Caffarella and Daffron.²¹⁹ There are four methods used in the dissertation, and they were implemented and reported in the two subheadings of Part II and III. The method description of the formative and summative approaches helps to answer RQ1 and RQ2.

Part II. Method One: A Formative Evaluation

Research Question 1: How can a grassroots effort to use online service-learning courses technology for volunteers continuing education contribute to the needed competencies for practitioners to help save cultural resources?

To answer the first research question, I combined two methods to overcome any shortage of data from the early adopters of the course, Learning Places, as enrollees: Method One, a formative evaluation or assessment of the functionality of the online program. Besides the program's functionality evaluation, I added Method Two as a summative assessment of the impacts or outcomes of the participant competency gains in K, A, B. together; they can combine answers for RQ 1. The formative and summative methods results may only provide aids to extrapolate a range of future impacts. Reports of outputs and impacts per cohort can accumulate

²¹⁸ Kenneth J. Linfield and Emil J. Posovac, *Program Evaluation: Methods and Case Studies*, 9th edition (New York: Routledge, 2018).

²¹⁹ Rosemary S. Caffarella and Sandra R. Daffron, *Planning Programs for Adult Learners: A Practical Guide*, Third edition (San Francisco: Jossey-Bass, 2013).

to be an annual benchmark for periodic summative assessments of achievements toward measurable outcomes within the preservation field. Therefore, the addition of post-course annual surveys emerged as an idea for creating more continuity in the evaluations.

For the 125th anniversary of the Montana State University commemoration event,²²⁰ a supplemental survey was distributed to raise awareness and be repeated for other special occasions. This data gathering and analysis technique solicit input from alumni of Learning Places that can lead to more enrollment or re-enrollment by volunteer service learners. In addition, survey results, taken directly from the past service learners who had enrolled in Learning Places, would benefit from a long-term perspective of effectiveness and the redesign of modules going forward.

Combining these two methods enables assessment of the functioning of the Learning Places as a new organization through formative evaluations. The assessment of the student's growth in the competency categories necessary for greater utilization of the federal and state HTC's assessed with summative methods. The growth in the preservation philosophy, regulations, and history of the field will construct the fundamental knowledge that can inform decision-making if there has been a commensurate attitudinal change toward applying the SOI Stds. Appropriately, then projects on any eligible older building will more likely be designed in compliance, therefore eligible for HTC as a qualified rehab. If the NPS review finds the design qualifies for the rehab, then the costs will be reduced by the IRS award of the tax credits. These

²²⁰ Robert W Rydell, *Democracy by Degrees*, Preface by Waded Cruzado, President MSU (Bozeman, MT: Montana State University, 2018)..Preface by the University President Waded Cruzado

____ Rydell, Robert W, Jeffrey J Safford, and Pierce C Mullen. *In the People's Interest: A Centennial History of Montana State University*. Bozeman, Montana: Montana State University Foundation, 1992.

completions are reported by the NPS and serve as the accessible annual metric and, if continually monitored, will track trends and increases in preservation activity.

Part II.1. Method One: Formative Evaluation

Method One Approach: a formative evaluation of how the program functions used a long series of questions²²¹ with multiple choices as a self-assessing means for growing the capacity to provide online learning for the sake of the volunteers. It addresses RQ1 so far as it detects the strengths and weaknesses of program functions using the formative evaluation tools by McKinsey²²² called Organizational Capacity Assessment Tool (OCAT). It serves to build the knowledge and competencies of users who enroll in the course or volunteer for participation in Learning Places, a nonprofit startup project sponsored by its fiscal organization, CN.

The McKinsey consulting firm developed a tool offered to the nonprofits receiving funding from foundations. Needing a formative evaluation for startups, like Learning Places, McKinsey would install over a hundred questions online for all staff and leadership to complete. The results would be indicators that can gauge the strengths and weaknesses of an organization. At the outset of building a new organization, the program evaluation can benefit from the exhaustive list of over 100 questions. It was online for a while when I first used it but has been removed by McKinsey and reserved for their clients' needs only. It used data gathering through my responses to find those functional areas that could benefit from their suggested readings and

²²¹ See Appendix for OCAT excerpts for Learning Places and in Chapter Five Part II

²²² McKinsey's OCAT was used to self-measure the strengths and weaknesses of Learning Places using the organizational capacity assessment tool.

tutorials. Foundation grant-giving clients used it to gauge the capacity of those receiving their grants. In my case, I applied it to measure Learning Program's organizational development.

OCAT as my choice for the formative evaluation of Learning Places was an early-on attempt to find salient factors affecting the organization's efficacy called Learning Places, a new nonprofit startup I founded, based on the McKinsey design for a systematic assessment of new nonprofits.

McKinsey originally called their instrument the Organizational Capacity Grid, designed in 2001. The name Grid changed to Tool and the acronym OCAT, for short. McKinsey developed the OCAT²²³ tool for foundations to use that funded newly assisted nonprofits. It can help develop a viable program in the ten aspects of an organization that McKinsey felt were critical for upgrading with coaching. The tool included the descriptions of seven elements of organizational capacity and their components. The scoring used by McKinsey involves automatically ranking each variable on a scale from 1–4 based on the person's answers to the multiple-choice answer that best matched their organization function at that the time of the assessment. I filled in hundreds of multiple-choice questions in the survey of my startup organizations to the extent that the questions were relevant at the early life stage of a nonprofit.

²²³ McKinsey's OCAT was used to self-measure the strengths and weaknesses of Learning Places using the organizational capacity assessment tool.

Question 1	Is our theory of change based on credible evidence?	
Question 2	1 Theory of change does not have a sound basis in facts, but may be based rather on historical approaches or specific visions of one or few individuals	2 Theory of change based on generally held beliefs that impact only the specific area; Research exists, but does not reflect the latest thinking on the given topic; Fit within the landscape of other players and nonprofits is minimally considered
Question 3	3 Theory of change based on recent evidence from the field and an understanding of the organization's role and opportunity for impact within the landscape of other players and nonprofits	4 Theory of change is driven by the latest research and evolves over time as the research, organization, and broader context evolves to constantly reflect the most impactful way to advance the organization's mission and vision

Figure 22. McKinsey Questionnaire from OCAT

It uses quantitative methods that sum up the qualitative responses and arranges them on a grid. The final report comes with a unique chart and narratives with coaching links selected for each nonprofit. It can help develop a viable program in the several aspects of an organization deemed critical for upgrading with coaching. A score per aspect of the significant faculties made for a successful organization and indicated the needed changes. These are helpful to many foundation-supported nonprofit start-ups striving for long-term growth goals and progressively positive early-stage evaluations. To optimize the results, all members of the leadership and programs of a nonprofit need to fill in the questionnaire. OCAT algorithms then average results per factor and group factors into the major areas of every good organization. After averaging answers and cross-referencing the disparities between responders' answers, they place them into a grid-like scatter plot graph and summarize them in the final report. In my case, a first attempt as the sole member of Learning Places, because there was no other nonprofit staff to compare answers with, led to a final report that was sans any divergent thinking.

For an example of the benefit of the specific assessment of Learning Places' strengths and weaknesses using the instruments of OCAT, I planned based on the list of prioritized needed improvements. I corrected one deficiency by joining an existing nonprofit sponsor group that helps nonprofit startups build capacity. For my nascent small community-based startup called Learning Places, the sponsor helps with many capacity enrichments like liability insurance, grant writing training, and online publicity for the bioregional community to view. The strengths indicated by OCAT stemmed mainly from the aspirational portions of Learning Places planning. Fundamentals of an organization needed to be fleshed out in critical areas that make a nonprofit viable. There is a life cycle for nonprofits from their grassroots beginnings to their mature public service stages, and OCAT and my sponsors nurture organizations through those stages. Casey Foundation²²⁴ has an OCA revision online based on the OCAT. One should follow the lead toward selecting an organizational capacity tool if it is

- “a self-assessment instrument that helps nonprofits identify capacity strengths and challenges and establish associated goals to track over time.”
- “It is primarily a diagnostic and learning tool. The tool enables users, ...grantors, to deepen their understanding of their grantees' current capacity.”

²²⁴ Casey Foundation, “Marguerite Casey Foundation Organizational Capacity Assessment Tool,” n.d., <https://www.google.com/url?sa=t&rct=j&q=&esrc=s&source=web&cd=&ved=2ahUKEwj2u8-KycLwAhVTHc0KHYMECMgQFjABegQIFBAD&url=https%3A%2F%2Fcaseygrants.org%2Fwp-content%2Fuploads%2F2018%2F03%2FOrganizational-Capacity-Assessment-Tool.xls&usg=AOvVaw0WVY-EOkOCEleJ7RGkzqc8>.

Respondents to your survey assigned the following scores to your organization's capacity levels for each of ten essential categories

Category	Score	Level
1. Aspirations	3.75	High level of capacity in place
2. Strategy	3.15	Moderate level of capacity in place
3. Funding	1.82	Basic level of capacity in place
4. Leadership, Staff and Volunteers	2.98	Moderate level of capacity in place
5. Values	3.71	High level of capacity in place
6. Learning and Innovation	3.75	High level of capacity in place
7. Marketing and Communication	3.30	High level of capacity in place
8. Managing Processes	2.42	Basic level of capacity in place
9. Organization, Infrastructure and Technology	3.00	Moderate level of capacity in place

[Results](#)

Figure 23. OCAT's Capacity Scores for Learning Places

The four capacity areas grouped by the OCA used by Casey Foundation are (1) Leadership, (2) Adaptive, (3) Management, (4) Operational.

Part. II.1.a. Other Formative Evaluation Opportunities: The online service learner was asked to share their experience level with HP and technologically aided courses.²²⁵ The instructor could then modify the course based on the level of preparation identified by the enrollee. Growth from their asserted baseline of preparation would be a more straightforward measurement to make if they complied. These prior experiences inquiries are part of the survey questionnaire and essential for assessing the 'zone of proximal development'²²⁶ of participants' technology and content knowledge. The evaluation of the participants' preparation using their feedback mode also reveals their digitally enhanced communication media skills. Furthermore, it helps with

²²⁵ Lux, Waterton, and AW Bangert, et al, "The Development of an Instrument to Assess Preservice Teacher's Technological Pedagogical Content Knowledge." Ibid.

²²⁶ Vygotsky, *Mind in Society: The Development of Higher Psychological Processes*.

formative assessments used for the continuous improvement of the course. Finally, it acts as an intervening change agent for more preservation activity.

Other formative assessments appear amid the six modules of the online course:

IDEALS: Module One through Six: Identify, Document, Evaluate, Assess, Learn, then Lead, and finally, Stewardship each have embedded assessment quizzes and tests. Prior experience can afford advanced placement if the formative evaluation vets the assertion by the student.

Identify, and Document are two of the first module levels. A student whose resume reveals many buildings have been field measured, hand-drawn, and computer-aided drafting, then the first module may be skipped, or they could brush up on some HABS recordation techniques. For those with prior experiences, the formative assessments would begin with evaluating the significance of the chosen cultural resource and using the Secretary of the Interior criteria to nominate a historic property to the National Register. If the student has already nominated places to the Register, they may skip to the next module. Here in Module Four, they could focus their first lesson and take quizzes on assessments of the conditions displayed by their chosen cultural resource. Assessing is where they read the building for its components and conditions and fill out field notes. Again, prior experiences with the technics offered in the modules could mean the service-learner is ready to take the findings of their chosen resource and gather the narrative history from the community so they could develop their final project. That person's final project would be two steps; after they meet their community partner, they prepare a preliminary report assessed by the cohort and then deliver their presentation to the community and reflect on the experience.

After vetting the assertion of prior formative experiences, the rest of the evaluation is more like a summative assessment of their participation. The course design has embedded inquiries to reveal the new participants' progress while online. More about summative assessments of the online participants follow in Part II.2, Summative Assessments.

Part II.2. Method Two Summative Assessments

The online course uses interactive asynchronous modes for the virtual portion. The enhancement of that experience for service learners can come from their face-to-face with their community partners while doing research and presentations. The assessment instruments use virtual methods adopted by the instructor, based on andragogical literature research.²²⁷ Assisting in monitoring the online message board are those participants taking turns as the weekly moderators of the posted discussion between members of their cohort as they move up the stepwise modules. Participation can add points to the eventual course final grade.

Using a summative assessment of those who enrolled in the online course reveals whether the program's function did help learners achieve the expected knowledge and competencies later to affect changes in the level of preservation activity. Keeping in contact with the alums of the Learning Places course will let me know if their outputs positively affected the outcomes for the chosen cultural resources in their local community or the activity level of the preservation field generally. Emailing requests for annual surveys and announcements of the

²²⁷ "Office of Education Technology: General Principles of Effective Practice in Online Professional Learning" (Department of Education, November 2014), <https://tech.ed.gov/wp-content/uploads/2014/11/Section-5-Online-Professional-Learning-Quality-Checklist-FINAL.pdf>.

Within the course the syllabus online follows a similar case studied for the "professional development for science teachers through "threaded" discussions and message boards "

____ Sloan Consortium. "Changing Course: Ten Years of Tracking Online." In *Education in the U.S.*, n.d. http://www.sloanconsortium/publications/survey/changing_course_2012.

recently completed reports by current cohorts will become a standard procedure. Archiving project work will enhance the core curriculum with the alums' actual preservation activity as exemplars for new enrollees.

These follow-ups add to the prior observations that assess participants' attitudes while the service learner was in the course. A community of learners who share their achievements is another degree of monitoring activity by the course facilitator. Finally, baselines for the local areas of the enrollees are researched through official annual reports by the NPS to compare activity levels before Learning Places launch and after to determine outcomes.

Part II. 2.a. Assessing Historic Preservation Knowledge and Competencies—Participant

Assessments: The data gathering occurs before, during, and after enrollment in the course.

Gathering measurements of the core indicators of changes in Knowledge, Attitude, and Behavior (KAB) facilitate the analysis. Samples from online embedded assessments include quizzes, moderator assignments, and required discussion posts found in several of the modules of the online course:

1. Module One: A sample assignment for the first module is: Identify and Discuss Choice of Cultural Resource.
2. The Discussion Post for Module Two: Document.
 - a. Use this discussion for any comments to accompany photo submissions of the chosen property. Take this module's quiz for 'Documentation.'
3. Module Three Evaluate: Midterm Assignment: Criteria for evaluation appears like the quote below:

- a. “The quality of significance in American history, architecture, archaeology, engineering, and culture is present in districts, sites, buildings, structures, and objects that possess integrity of ²²⁸” (1) location, (2) design, (3) setting, (4) materials, (5) craft (originally: workmanship), (6) feeling (the most subjective of all), (7). association
 - b. Participants choose a matching category to the seven qualities of significance.
4. Assignment for Module Four: Assessments of the condition of a property:
- i. The four major treatment categories. Standards exist for four distinct but interrelated approaches to treating historic properties: preservation, rehabilitation, restoration, and reconstruction. Which of the treatments will you most likely use in your chosen project? Participants first consult a website to learn the standards.
 - ii. Review the findings of the previous modules: Documentation, Evaluation for the justification for rehabilitation as the chosen treatment. Rehab treatments can earn tax credits if plans are prepared by a qualified professional and approved by the NPS. Make a predictive ‘Assessment of the Effects’ of the rehab process on the current physical conditions that touch upon the historic fabric’s integrity questions.

²²⁸ See more guidance about the criteria for determining significance and integrity at the National Register Program: <https://www.nps.gov/subjects/nationalregister/index.htm>

5. Assignment for Module Five, 'Learn then Lead,' asks them to become a project leader for their chosen cultural resource and act as an 'informal teacher.'²²⁹ In this Module Five, the participant transfers acquired knowledge and findings. Others in the cohort will critique the presenters while each takes their turn, using peer review rubrics. Lastly, the instructor will assess all of the cohort members' participation levels, looking for signs of cognitive presence.
6. Final Report: The report is the presentation to attract local civil society members to help save cultural resources in their midst. The stewardship tier is where viewers see the service learners' presentations face-to-face or online through any digital apps. Service learners post a copy as a streaming lecture to a webpage.

²²⁹ Burke, "Antonio Gramsci." See <https://infed.org/mobi/antonio-gramsci-schooling-and-education/>. Regarding informal teachers. Each enrolled service-learner by the fifth module will demonstrate their leadership and teaching what they were trusted with by their key informants of the old narratives.

Table 3. In-Course Summative Assessments for Competencies K, A, B

<u>I.D.E.A.L.S. as Syllabus</u>	<u>Content</u>	<u>Outputs</u>	<u>Assessment for K,A,B</u>
Module 1 & 2 I = Identify D = Document  Illustration by R. Giambardine, NPS	Log in and obtain readings and reference materials Scan the environment. Secretary of Interior's Standards NTHP Eleven Endangered Building List	Read assignments found in the course "Content." Enrollees post the resume for introductions. Find your module by module rotation as a Facilitator or Learner discussion area. Contact community Topic Selection	.. Pre-Course survey provides the level of preparation for the content and technology used in the course. Adjustments can be made to customize the course to suit beginners or advanced. Every student will have a turn at facilitation and pin up their preliminary project. Then, they lead the online cohort by presenting how they will save their chosen building or landscape by adhering to the Standards.
Module 3 E= Evaluate 	Site Visit Inspection Investigation Research problems	Posting discussions based on Module two readings Post your Project topic and its early findings, warts, and all. Midterm Assessment Open-ended narratives about research.	Each of the six modules presents another of the 10 Secretary of Interior's Standards. Online course quiz, assignments, discussion posts will be monitored for service-learner progress through the course.
Module 4 A = Assessment 	Develop Solutions Test proposed solutions against Standards Find case studies to support approaches Graphical, photo / video Documentation pursued	Meetings on site Meetings online with groups to develop alternative solutions; Search the literature for data and past Best Practices. Research methods of implementation test the efficacy of solutions.	They incorporate relevant guidelines for use with the Standards. Generating alternatives and using a ranking system for the most compatible choices as per Standards. The Standards vary slightly with each of the recognized treatments: Preservation, Rehabilitation, and Restoration. (Reconstruction is not in the curriculum) The learner's justification for actions at each of the modules through the IDEALS syllabus. Moderator gauges learning and critical thinking levels

The Assessment Matrix for the online course is laid out for each module and its contents, outputs by service learners, and the assessments used for growth in the K, A, B.

Table 4. Continued from Table 3 In-Course Summative Assessments and K, A, B

<u>I.D.E.A.L.S. as Syllabus</u>	<u>Content</u>	<u>Outputs</u>	<u>Assessment for K,A,B</u>
Module 5- 6 L = Learn S= Stewardship  Post Course Survey and Feedback reflections:	Propose Project Design Develop a preliminary presentation Last Site Visit Final Project Reports Final report and launch of a website for project results is completed. Post course survey reflections via Microsoft Forms is compared to pre course survey by Survey Monkey.	Class critiques others preliminary Pin-Ups. --support project in a presentation, on posts to the discussion board, they ask questions and remain skeptical, seek the most appropriate solution. The final presentation to clients has self-assessment and reflection. Applying the techniques learned will lead to the (a) cultural resource nominated for the N.R. list; (b) designs a treatment plan used by the client community and volunteers to help save cultural resources. (c) Renew with Learning Places for a second cohort to complete (a) or (b)	The chosen alternative has incorporated a narrative of community wishes and its compliance with the standards. Learners convey narratives from their community immersion and lead a project. There must be an emphasis on using the standards for compliance purposes, then assessing the student's reports for the use of the Standards. There are several embedded rubrics in a quiz format. The Pre and Post survey indicates a positive change, commitment to the chosen project compared to pre-survey. Upholds sensitivity and confidentiality for gaining trust with local key informants and looking for substantial changes compared to pre-course survey responses. Learners complete the surveys with reflections on past and present behavior and feelings toward CRM, historic properties, and any threats to their preservation. Identifies with the preservation field expands from a casual appreciative observer to a concerned citizen
	Cultural landscape field exercise as per Don Meinig's Ten Ways¹.	Re-photography as per Dr. William Wyckoff² and a character-defining matrix is offered.	It can be used for displaying skill in mastering photographic and research techniques for final reports. Enables the detailed comparisons of change over time and deterioration or replacement.
Extra Credit Modules 7-8 	Complete the NPS Preservation Briefs readings and pass quizzes via links to HPEF /AIA and eam HSW.	HPEF offers lessons based on the following ten NPS Preservation Briefs through their online website: 11, 15, 17, 27, 35, 39, 42, 43, 44, 45, 46	Online quizzes for each of the ten AIA approved lessons based on the content of each of the ten preservation briefs. One must achieve an 80% or higher to pass the quiz and have credits reported directly to the AIA for transcripts of continuing education (HSW) credits.

Part II. 2.b. Learning Management System's Automated Tools for Analysis. Since

Learning Places is an asynchronous course offered through the 'free to teachers' option' on the Canvas by Instructure's Learning Management System (LMS), the service learners can access the core modules, quizzes, and required reading wherever and whenever they choose. Thus, a temporary community of unrestricted pace depends on the level of preparation as they support

each other while learning ‘how-to’ to help save their individual cultural resource choice.

Furthermore, the host community that the service-learner chose to work with can also provide their responses to an online poll about the service-learner, the LP program, and the online access facilitation.

Participation is much more than the student’s performance metrics recorded for customized quizzes based on unique rubrics and other benchmarks; it involves acting as the module moderator or contributing comments to help others. The participants help improve the course by assessing the course at midterm, after the final reports using outcome-based reflection.

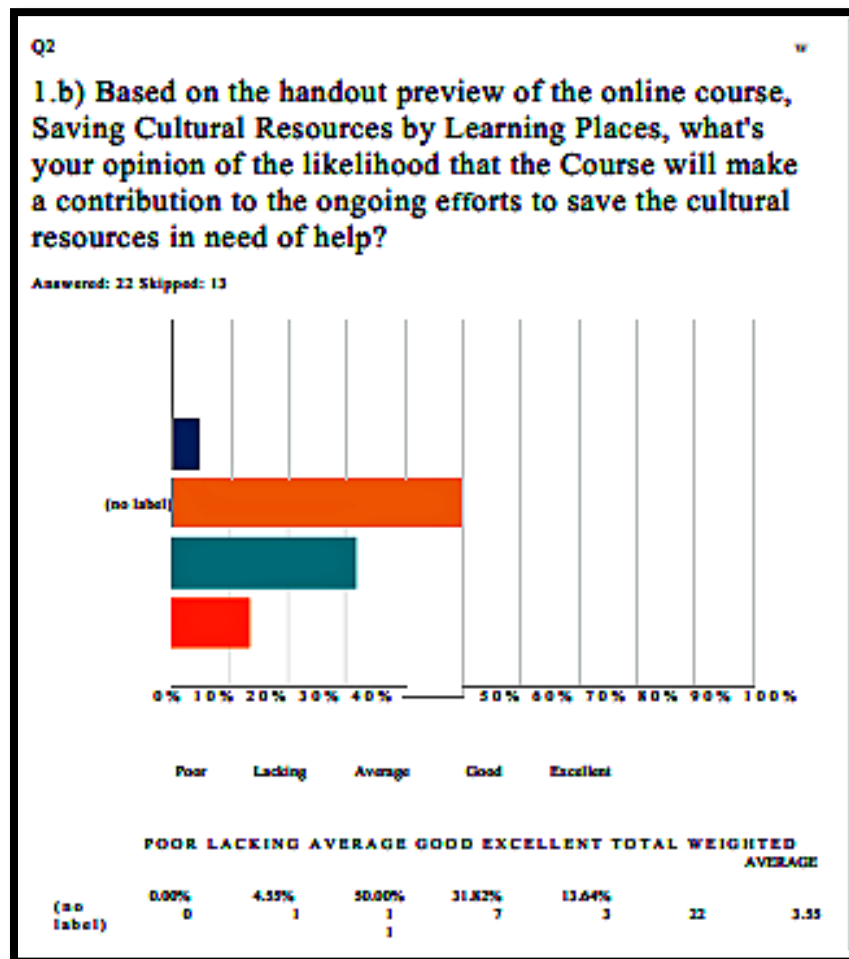


Figure 24. Pre-Course Survey Sample Chart

Participants can take advantage of three incentive programs, getting credit for the annual minimum of 6 hours of learning units for reporting to the AIA or State Licensing Boards after receiving a certificate of completion from LP. Secondly, they can try extra credit modules through links to HPEF, which have posted quizzes online and report to the AIA. These efforts are recorded for the instructor's benefit as well as in calculating the summative evaluation grades. Lastly, the continuing education credits are records of having historic preservation training that can accumulate to meet the qualification standards for work experiences required by the SOI Standards for professionals.

The following Table 5 compares the three elements of competency that are measurable and influence preservation activity: Knowledge, Attitudes, and Behaviors. Each K, A, B has a column for matching indicators and measures. The indicator column shows what is expected to be found per competency. The measures or methods employed before, during, and after the course are tabulated in the last column.

Table 5. Competency Indicators and Measures for Knowledge, Attitudes, and Behaviors

INDICATORS		MEASURES
<u>Knowledge</u>	Each of the six modules presents another of the 10 Secretary of Interior's Standards. An emphasis on using the standards for compliance purposes, then assessing the student's reports for using the SOI Standards, is the embedded rubric. See the list under competencies that follow and under the syllabus descriptions in Chapter Three. The Standards vary slightly with each of the recognized treatments: Preservation, Rehabilitation, and Restoration. (Reconstruction is not in the curriculum)	Online course quiz, assignments, discussion posts will be monitored for service-learner progress through the course. Every student will have a turn at facilitation and pin up their preliminary project. They lead the online cohort by presenting how they will save their chosen building or landscape by adhering to the Standards. They incorporate relevant guidelines for use with the Standards. Generating alternatives and using a ranking system for the most compatible choices is done knowledgeably of the standards. The chosen alternative has incorporated a narrative of community wishes and compliance with the standards.

Table 5 Continued

INDICATORS		MEASURES
<u>Attitudes</u>	Learners convey narratives from their community immersion and lead projects. They seek extra credits beyond the standard core modules. They can support their project in a presentation independently. In discussion posts, they ask questions and remain skeptical²³⁰ until they can offer the most appropriate solution. Pre and Post survey questions of students' participation completed thoroughly show a positive change. In addition, the evaluation of conveyed findings, using digital and oral history tools, shows commitment to the chosen project.	The learner can volunteer their justification for actions as they move stepwise through the IDEALS syllabus. Responses at the end of the course in the final presentation can be compared to earlier quizzes answers to gauge learning and critical thinking levels. Comparing answers to doctrinal requirements are present. Retrospection by the student will reveal changes, using Likert-like scale multiple choices. Complex ideas are discussed and show cognitive presence. The evaluation checks the historic property proposal for its compliance with the Secretary's Standards as a self-assessment checklist. Incorporating the compliance with the Secretary's Ten Standards in the visual representations of proposals will be assessed qualitatively
<u>Behaviors</u>	Applying the techniques learned will lead to the (a) cultural resource nominated for the NR list; (b) designs a treatment plan used by the client community and volunteers to help save cultural resources. (c) Renew with Learning Places for a second cohort to complete (a) or (b)	Open-ended narratives about what was acquired and recounted by a student while in Learning Places. Learners complete the surveys with reflections on past and present behavior and feelings toward CRM, historic properties, and any threats to their preservation. Identifies with the preservation field expands from a casual appreciative observer to a concerned citizen. Upholds sensitivity and confidentiality for gaining trust with local key informants. Whatever is shared, of significance, with the cohort and community measures above their pre-course knowledge and appreciation as substantial.

²³⁰ King, Keohane, and Verba, *Designing Social Inquiry*.. KKV suggestion: Four guiding themes will help develop better research designs: 1. Using observable implications to connect theory and data; 2. Maximize leverage; 3. Reporting uncertainty; 4. Think skeptically and use rival hypotheses.

Changes in knowledge, attitudes, and behaviors are the three aspects of experiential learning measured for determining the educational intervention's effectiveness in terms of participant competencies. The individuals' participation is observed and assessed using designed instruments and rubrics. Data gathering followed by a search for indicators and measures appropriate to the subject matter is saved. The broader objectives of the service-learning online course can follow the increased preservation actions as a community of learners expands.

The Secretary of the Interior Standards' importance is often mentioned because a project can be disqualified for not complying with the standards when applying for HTC's²³¹ or using federal funds when hiring consultants, working on National Register properties, or seeking approval under the section 106²³² procedures. There is variation in the wording of the standards relative to the treatment choice and follows an adage from the 1936 Advisory Board for Parks, Monuments still followed today as a 'rule of thumb' when choosing appropriate actions to take.²³³

It is well to bear in mind the saying, "Better preserve than repair, better repair than restore, better restore than [re]construct." As a corollary, it is noted, "It is ordinarily better to retain genuine old work of several periods, rather than arbitrarily to 'restore' the whole, by new work, to its aspect at a single period." After completing the course, the service learners possess knowledge and skills in other areas relevant and valuable to their design of treatment plans for saving cultural resources. Participants' answers to

²³¹ The [Standards for Rehabilitation](#), codified in [36 CFR 67](#), are regulatory for the review of rehabilitation work in the [Historic Preservation Tax Incentives program](#). The Guidelines are advisory, not regulatory.

²³² Section 106 of the National Historic Preservation Act of 1966 (NHPA) requires federal agencies to consider the effects on historic properties of projects they carry out, assist, fund, permit, license, or approve. <https://www.achp.gov/protecting-historic-properties/section-106-process/introduction-section-106>

²³³ National Park Service Cultural Resources Management Policy, Source: NPS-28.

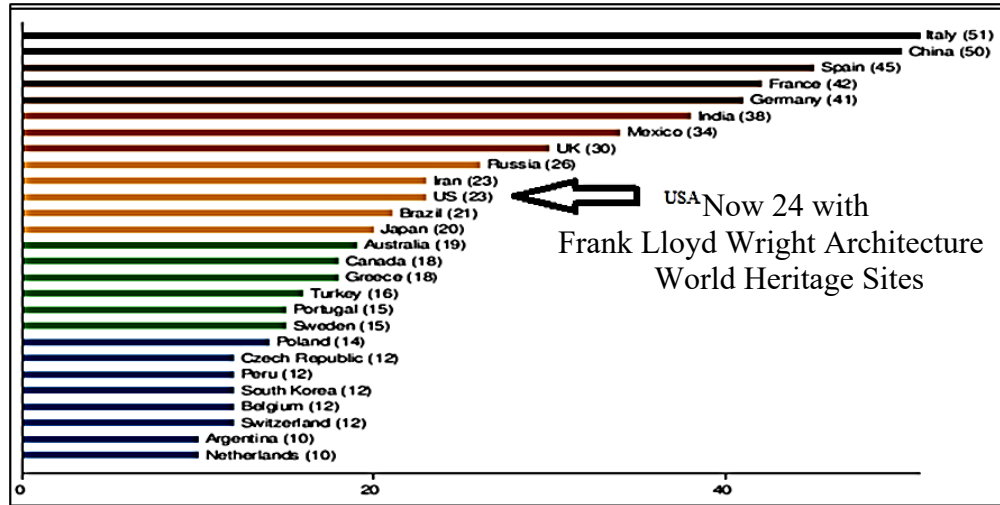
questions, assessments and preparation of the final report display the acquired vocabulary from learning the SOI Standards, the cultural resource characteristics, and significance statements. The use of rubrics for grading content is an indication of knowledge gained. The frequency of participation is tracked by the LMS and monitored by me as the instructor is another way of benchmarking attitudinal change as the course modules get more complex. Measuring the length of time spent viewing pages can detect interest and behavior change as it could lead to an exhibition of cognitive presence. Most learners will prepare their project's narratives, and their selection of the most appropriate preservation treatments will be assessed for their adverse effects and based on the degree of compliance with the relevant standards. Their final reflections about their final grade and instructor's feedback will be assessed to measure growth and understanding while citing more terms and vocabulary from the ten SOI standards. Evidence of cognitive presence is the criteria.

To be a member, the United States adopted the standards of UNESCO/ICOMOS and the World Heritage Sites conventions along with other member states. These adoptions of conventions began with the Venice Charter and all later amendments. The NPS translates the international standards by using the SOI standards.

The IDEALS. syllabus conforms to the standards as it leads the learner in a stepwise manner as technics are acquired. They learn how to design to meet the internationally accepted historic preservation standards and stress protecting and perpetuating authentic surviving resources. Therefore, the following Secretary of Interior Standards is to be applied to 'rehabilitation' projects reasonably, considering economic and technical feasibility.

World Heritage Sites Per Member State of UNESCO

Table 6. World Heritage Sites Ranking by UNESCO / ICOMOS. The USA is at Mid-Point on the Chart above.



A revised illustrated guideline was published twenty years after promulgating the standards needed to go over every nuance per standard to help users. Those guidelines were developed heuristically based on learning by doing real-world projects and showing the variations when working with stone and wood, and various metals. The test of the acquired competency for online learners involves their final report for the chosen cultural resource and how well their recommendations adhere to the following standards.

Secretary of the Interior's Ten Standards

1. **A** property will be used as it was historically or be given a new use that requires minimal change to its distinctive materials, features, spaces, and spatial relationships.
2. The historic character of a property will be retained and preserved. The removal of distinctive materials or alteration of features, spaces, and spatial relationships that characterize a property will be avoided.
3. Each property will be recognized as a physical record of its time, place, and use. Changes that create a false sense of historical development, such as adding conjectural features or elements from other historic properties, will not be undertaken. Changes to a property that have acquired historic significance in their own right will be retained and preserved.
4. Changes to a property that have acquired historic significance in their own right will be retained and preserved.
5. Distinctive materials, features, finishes, and construction techniques or examples of craftsmanship that characterize a property will be preserved.

Figure 25. Secretary of the Interior's Ten Standards—1 through 5

I changed the font simulating the difficulty for beginners, and everyone needs to do their due diligence when working with the standards.

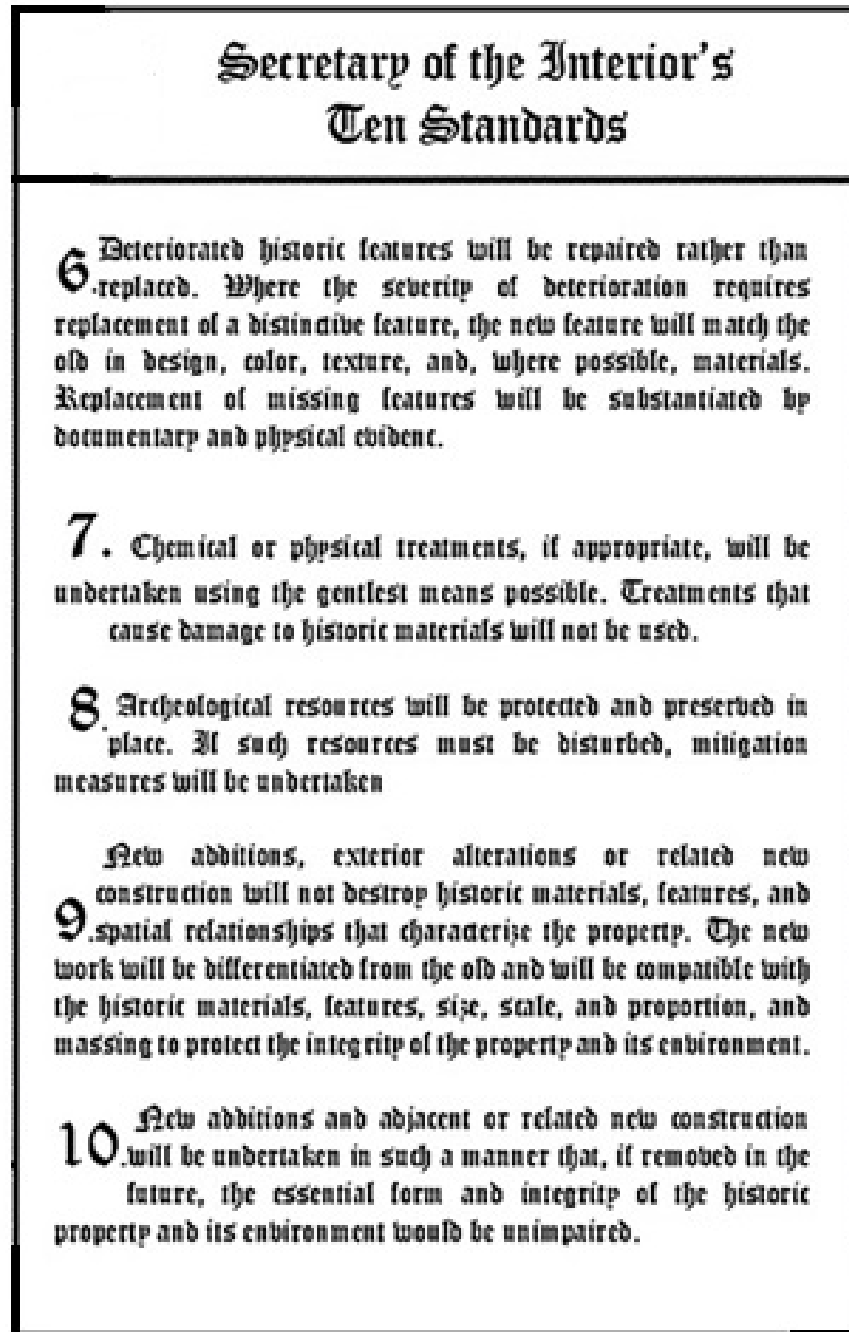


Figure 26. Secretary of the Interior's Ten Standards—6-10

Noticing how Standards 6–10 are more challenging to read (except for a Middle English calligrapher), it demands more attention must be paid for cognition. One ought to pause to be sure they are getting the meaning. Pausing while reading the standards might cause the reader to check the meaning by researching the more explicit and illustrated guidelines that help adhere to the standard. What it is like for neophytes to apply the SOI Stds. can be summed up by paraphrasing Dr. Richard W. Sellars’s warning to any NPS park superintendent before doing maintenance work on a landmark building;” he would warn them with good old country music lyrics “just because it feels good that does not make it right.”²³⁴ ”

Learning Places has embedded ways to measure the participant’s changes in their competency and attitude derived from their answers to the pre-course survey and post-course survey questions. When possible, the participants’ changes could be cross-referenced to the community hosts’ responses to see if they concur with the claims of adjustments or growth in preservation activity. A final leg of triangulation for judging the changes could come from those moderating the online course activity. That includes the moderator, facilitator for instruction, and any temporarily assigned moderators of module discussion. Measuring the service learners’ participation can be tabulated rates, time and page quantities, and grades per assignment in Chapter Five, Part II. That is what I gathered to know that a community of learners had formed, and there was participation where it was expected and tracked by Canvas and my monitoring the online course discussion posts, for instance, allowed recognition of cognitive presence.

²³⁴ I used Ronnie Millsap’s lyrics, but the same sentiment has been used in songs from Bob Willis to Barbara Mandrell. I recall Dick Sellars like to quote Conway Twitty as well.

Going for extra credit modules such as cultural landscape topics that provide access to tools and techniques for the broader spectrum of historic properties, including historic rural landscapes and agricultural structures, is another sign of change in behaviors. Links to Google sites or blogs offered by learners indicate the sixth module's penultimate achievement: stewardship by the service learners. These online sites and social media webpages can become the communication framework for the projects going forward, thus keeping alive the community of learners beyond the core course. By repeated monitoring of those sites in the future, I can judge behavioral changes towards more preservation activity and track progress in implementing the service learners' treatment plan for their selected cultural resource. Annual awards for the most innovative, progressive, or other achievement qualities can elicit more change from those who have completed the course par excellence.

The datasets of observations can provide enhancements going forward if archived. Keeping these tabulations on spreadsheets after analyzing, sorting, and grouping raw scores into ordinal ranking generates theory updates. This works for the participants' online activities and the study area's annual updates about federally funded grants and HTC project approvals. Therefore, using REAP for a longitudinal study is appropriate. The method for tracking and indexing the attitudinal changes of enrolled learners and seeking proof of their application of learning to their professional and volunteer preservation activity adds more datasets for comparisons.

The take-away information from Part II methods of formative, summative, and REAP is that they do provide answers to RQ1 and partially answer RQ2. Because of my experience as an architect and preservationist turned online educator, I learned from moderating the online course

over the past two years that participants mostly come from the ranks of active preservationists who join nonprofits or landmarks commissions. They are already members of the choir, requiring no further preaching, having the same preparation and proclivity for altruistic voluntarism for the sake of HP.

Unfortunately, there has not been a solid response to the offer of free online continuing education from those who did not receive the preparation and were not inclined to volunteer outside their comfort zone. Could this be the intransigent profile of those in the architectural field who have eschewed projects involving the HTC's? Searching for a common factor as a cause for the lag mentioned in RQ 2 needs a broader context subjected to constant comparisons and analysis methods for the research approach. Moreover, a hypothetical cause of the lag may be solely the decision of the private property owners without community input and consultation with preservationists. In that case, the multifactorial variables become as numerous as the number of properties enjoying tax credits, 45,000, and the exponentially more significant number that have missed the opportunity and foregone the credits. If one concludes that the missed opportunity is attributed to many causes, there may never be a single factor or actor explanation for a forty-year-long lag in participation. Still, the key informants have made many conjectural theories in an unstudied opinion that some factor or attitude can cause the lag described in RQ2. Furthermore, the several key informants' responses varied and did not reach a consensus on any singular cause.

To systematically consider what is hindering the use of HTC, two other methods for measuring attitudinal and behavioral changes, and the broader context that these choices are carried out. First, for the course metrics and the qualitative data derived from the pre-and post-

course surveys to be seen in this broader context, I used many observations in a third method, using REAP. Secondly, Constant Comparison (CC) is the fourth method described at the end of the following Part III.

Part II.3. Methods Three and Four

The last two methods were structured and used to develop a systematic understanding of the larger socio-political dynamics and conditions that impact the Learning Places program's capacity to enhance historic preservation. In each of the previous methods, I mentioned the attempt to answer one of the three research questions. In Part III, I introduce the last two methods, describe ways to supplement the formative and summative findings, and scan more broadly for context. The data used comes from annual records for the actual preservation activities in the chosen study area of eight rural Western states that took advantage of federal programs by varying degrees. By studying half of the lifetime of the HTC public record, 1999, I hope to find more insights into the lag in using the HTC to answer RQ 2 more fully.

The outlook for a more resilient community can use REAP and CC methods. I observed and compared the communities' attitudes and behaviors vis-a-vis the preservation activity over the past two decades. Knowing the past activities may provide insights about attitudes and performance by those on a participation spectrum from those fully engaged with preservation programs to contrast their behaviors with those displaying more intransigence or resistance to federal/private partnerships for preservation.

Part III.3.a. Method Three. Rapid Ethnographic Assessment Procedures (REAP) for field observations, recording and managing the data gathered about those communities and institutions on an innovation of mine called the spectrum of preservation activity. At one end are the easily

researched positive, participatory actions reported annually, having a public record of proud achievements. However, transparency is not always the case. On the other pole of the spectrum, those who have resisted, canceled participation after first applying, or fought others engaged in preservation leave a less transparent record. Ethnographic methods can be resorted to if there are no published records or non-disclosure agreements protect them. The range of responses and observations from those most reluctant to use the opportunity of the federal program's financial support rationalize their intransigence with oft-repeated diverse expressions of concerns as follows:

- avoidance of federal entanglements
- myths of rugged individualism
- lack of knowledge of programs or educational opportunities and examples to emulate
- the disparity of financial liquidity; rigors of the programs' mandatory requirements
- subjective nature of the review process for nominations to the National Register
- short-term versus long-term investment strategies
- developers' level of identification with the local community heritage
- historical patterns of discrimination negate others cultural values

Nevertheless, several valuable inferences may emerge from the testimony restricted by not-for-attribution limitations when compiling the broader picture of preservation activity in the study area's selected states.

Additionally, Method 3, REAP, and Method 4 CC will combine to answer RQ2 by working in combination while shedding light into RQ3 but not answering it comprehensively due to the scope and complexity of multifactorial cause agents. A systematic understanding of the

more significant socio-political dynamics and conditions that impact the Learning Places program's capacity and the field of historic preservation is pursued, nonetheless.

I used REAP techniques for managing the data from the observations of people and institutions' whose diverse expressions of concerns about federal entanglements, myths of individualism, lack of knowledge of programs or educational opportunities, disparity of financial liquidity, rigors of the programs' mandatory requirements, subjective nature of the review process for nominations to the National Register, short-term versus long-term investment strategies and developers' level of identification with the local community heritage. As a result, several valuable inferences may emerge when compiling the broader picture of preservation activity in the study area's selected states to help answer the RQ3.

Rapid Ethnographic Assessment Procedures (REAP) are very helpful for the service learners to use in their face-to-face meetings while on field trips working with and learning from the local community. REAP's methods also helped with the observations of learners in contact within the small world of architects and preservationists involved in my research in the field and online. The feedback from interviews and documentary research while meeting with key informants from the beginning of the course design influenced the launch online.

See the more complete REAP table of methods in Appendix E used for observations and interviews that guided the ultimate course launching of Learning Places via Canvas and open to the public. The Canvas LMS records all metrics of activity and participation, yielding data for analysis. The data includes comments and responses that can point out the strong points and weak ones to inform my search for attitudinal changes and behavioral activities. As mentioned earlier, it also enables critiques of the content and user experiences currently embedded in the

online course design and learning system platform. It averages results from all cohorts in the first-year pilot run of Learning Places. Finally, the course's syllabus, IDEALS, has embedded instruments that yield measurable results of the service learners' progress.

REAP methods for using oral history, and multiples of observations were completed as part of the mixed-methods design for finding participant indicators of changes in their K, A, B. One key to the non-textual data came from the ethnography, and environmental psychology scholarship renewed and reworked in the REAP corpus.

Recording the observations of the participants' required different data extraction methods and analysis,²³⁵ using the following opportunities:

- Automated data collection plans for the first years of the Canvas version currently online are disaggregated by the LMS per learner: pages viewed, time online, the number of modules visited, quizzes taken, participation rate within discussion posts. Similar data analytics from the original course Saving One Room Schoolhouse (made available on D2L); however, those hybrid observations of face-to-face and virtual instruction.
- Observations while implementing the online course as the participant-observer for weekly online discussions and welcoming new learners to Learning Places, reviewing the learner's 'bios,' and their proximal development zones.

²³⁵ Strauss and Corbin, *Grounded Theory in Practice*.

- Assessments of the quiz and final report are recorded and averaged over the cohort, and feedback and comments are exchanged with the grading of learners' output within the Canvas digital grade book.
- Observations of learners' progressive engagement with the course activities, such as acting as module facilitator for discussion posts, extra credit module attempts, and re-enrollments, are good indicators.
- Reflections from the several face-to-face demonstrations of the offering as an online course. Feedback from the interactions while marketing at annual conferences of the Montana AIA, Great Falls and Billings Architectural Association, local museum, city preservation fairs, and county historical tours.
- Responses are considered as they come from online message boards with the national preservation organizations, the AIA; publishing online course offerings via the AIA newsletter as info-marketing; multiple grants writing feedback.

The observation opportunities are sources for data to be used by the REAP to gather feedback from key informants involved since the beginning. The original course was tested by volunteers using the version on D2L hosted at MSU. The whole table in Appendix E and additional samples in Chapter Five Part II contains the relevant contributions that REAP made for my data collection, products, what can be learned, and what was learned.

Table 7. Sample from the REAP Tables Showing Data Collection Goals

REAP: RAPID ETHNOGRAPHIC ASSESSMENT PROCEDURES				
METHODS	DATA	PRODUCT	WHAT CAN BE LEARNED	WHAT WAS LEARNED
Historical and archival documents	News clips, publications, collections, articles, notes, lectures, photos	People's history of relating to surrounding communities	Historical context for the current study and saving cultural resource planning	See Chapter Five Part II Tables.

For participants during the course, each learner has to complete quizzes and assignments graded with rubrics. In addition, the enrolled students are encouraged to create a web page to publish their reflections about their experiences producing and presenting the final project, including graphics, research, and other illustrations. Participants' work online is graded using rubrics specific to the goals set by the learners for their project. All six modules build upon each other using course content and the embedded assessments, reaching the course's pinnacle, a final report. The report contains the most appropriate treatment option, and it is presented first to the cohort for their preliminary critique amongst peers.

Contributors to these 'pin-up and crit' sessions are moderated by the facilitator and assessed for their use of cognitive presence. The participant then finishes the final report, presents it to the community, and then reflects on the experience for their final assessment. Three assessment levels aimed to improve the final product and give each participant leadership as they become the ones imparting what they have acquired while they engaged in Learning Places. If they prefer an alternate final assessment because they did not choose a favorite cultural resource, they can review a historic district's nomination and answer questions about its authors' challenges, strengths, and weaknesses.

All service learners have to reach a new level of competency and demonstrate that in their presentation at the end of the sixth module. In the methodology used for the summative evaluation, these final module steps give the learner several opportunities to participate with others and take roles such as moderator, presenter, and reviewer that counts toward their final assessment. In addition, growth in the desired competency, such as knowledge of new content in historic preservation and attitudinal changes, will be measured.

The attitudinal will be observed, and REAP techniques will be employed to denote the degree of participation, discussion, and helpful review contributions. The content that is essential to master can be studied online, and the use of the two critical checklists shown in Chapter Three and below includes the Secretary of the Interior Standards for Rehabilitation of historic properties and the requirements for the NR nomination.

The standards and checklists are the gold standard for compliance reviews for HTC qualified rehabilitation and attaining the NR status. In addition, the checklist of steps toward a nomination for an older building or site aids the preparation for a review by state and federal officials who must approve the applications for the Keeper of the National Register.

In this chapter's last evaluation method, I present some novel analytical tools for my CC method, as per Glaser and Strauss,²³⁶ to develop a contextual model for the preservation activity in the study area. The REAP methods, developed for use in public place studies of users, have been developed by Setha Low.²³⁷

²³⁶ Barney G. Glaser, "The Constant Comparative Method of Qualitative Analysis" 07, no. 03 (November 29, 2008), <http://groundedtheoryreview.com/2008/11/29/the-constant-comparative-method-of-qualitative-analysis-1/>.

²³⁷ Low, *Spatializing Culture: The Ethnography of Space and Place*. Dr. Setha Low has done several studies of special places for the National Park Service.

Constant Comparisons use repetitive evaluations adding to the mixed-methods data collection and analysis value. Studying the problem at the three scales may overcome any weaknesses inherent in a single method at one scale. In addition, credibility was increased for the evaluation findings when triangulating different data sources.

The criteria for selecting the states for this study include: (1) Adjoining states lag in HTC projects; (2) Mostly low populations, concentrated in few metropolitan areas; (3) Somewhat similar bioregional characteristics; (4) Diverse cultural affiliations with a low level of diversity amongst the governing class. Furthermore, I look at numerous other factors to help differentiate the states in the study area from past findings.

By ranking the activity over time in these eight states, one can differentiate amongst several Historic Federal Preservation programs' funded projects compared to the level of utilization by the private sector of the benefits of the HTC incentives.

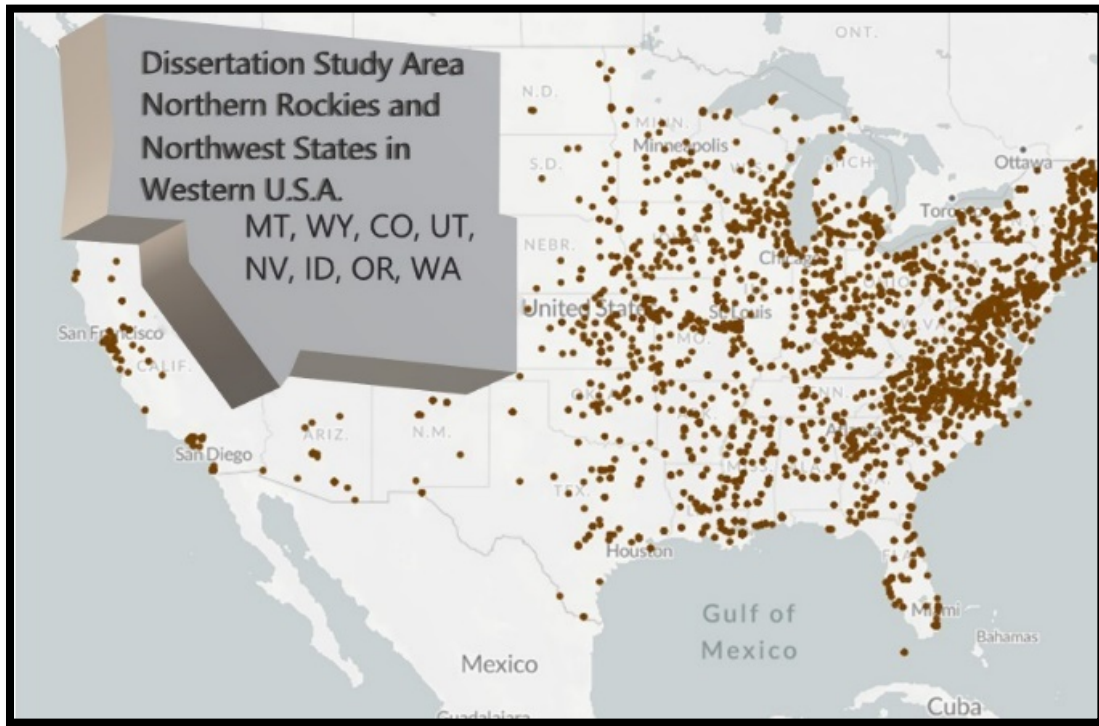


Figure 27. Mapping HTC in the United States

I attempt to make arguments that provide insights as I try to falsify theories generated by constant comparisons. First, I listed those conjectural hypotheses offered by key informants. Then I pursued experts' testimony from my interviews; some provided unexpected candor and insights. I make sure I listen to participants at all levels of the CRM field. Comments from the public cover a broad spectrum of appreciation for historic sites and preservation.

The online participation was a generator of feedback, and the online summative evaluation and Canvas LMS metrics provided reliability for using these observations that informed the adaptive changes in approaches. Moreover, if the feedback was consistent, it helped me rule out some alternative methods, mainly when new data corroborated past observations or provided unexpected findings.

Numerical and textual analysis of the data gathered from multiple sources provides the raw material for tabulations. Mapping observable behaviors of participants while they work online, adds predictability for changes to future module design. I was tracing the behavior of those who stuck with all modules compared to those who bounced without completing the online course, which added more perspectives for me, as both researcher/instructor, to make judgments about participant experiences and expectations.

The eight states in the study show distinct differences in the use of those tax credit incentives offered to support the preservation of significant cultural resources through qualified rehabilitation projects. Some states ranked at the bottom of the list for the national utilization of HTC's within the eight-state study area. Other preservation activities promoted by these eight states provide comparative context opportunities when data is collected and analyzed using several methods discussed later in this chapter under the heading for V. Method III. Comparisons of Preservation Activity.

I used remote observations for the contextual analysis from published reports and gleaned preservation activity dynamics in the eight-state study area. In either case, the raw data needs an informed analyst to systematically do the indexing and value scaling, as in CC. Used to falsify conjectural hypothesis and build up to an expression of a working theory was attempted. The four stages of CC, when applied, informed the testing of the conjectural hypothesis suggested by HP experts. Glaser's Four Stages and my use of CC are in Table 8 below.

Table 8. Constant Comparison Method's Four Stages

Glaser's 4 Stages of Constant Comparison (CC)	Learning Places Use of CC
Comparing incidents applicable to each category:	Historic Tax Credits (HTC), grants (HPF)
Integrating categories and their properties	Community actions and government aid combined to define an index of activity per state in the study area.
Delimited the theory	Official records for two decades and expert's conjectural covariate factors as hypothesis.
Writing the theory.	Falsify conjectural hypothesis by experts.

Glaser's CC method generates theory through joint coding and analysis. My REAP use combined with CC includes the published records for federal aid and incentives for my quantitative data collection. The qualitative data from my observations and oral interviews with several HP experts and participants provided, collectively, several conjectural hypotheses from the procedures using REAP to inform my analysis. Glaser and Strauss suggest this as a third approach to the analysis of qualitative data; it "is a favored analytic procedure using qualitative data, within the explicit coding procedure of theory development by researchers." CC demonstrates "the interdisciplinary potential of the classic grounded theory method."²³⁸

²³⁸ Glaser and Strauss, *The Discovery of Grounded Theory: Strategies Fro Qualitative Research*.

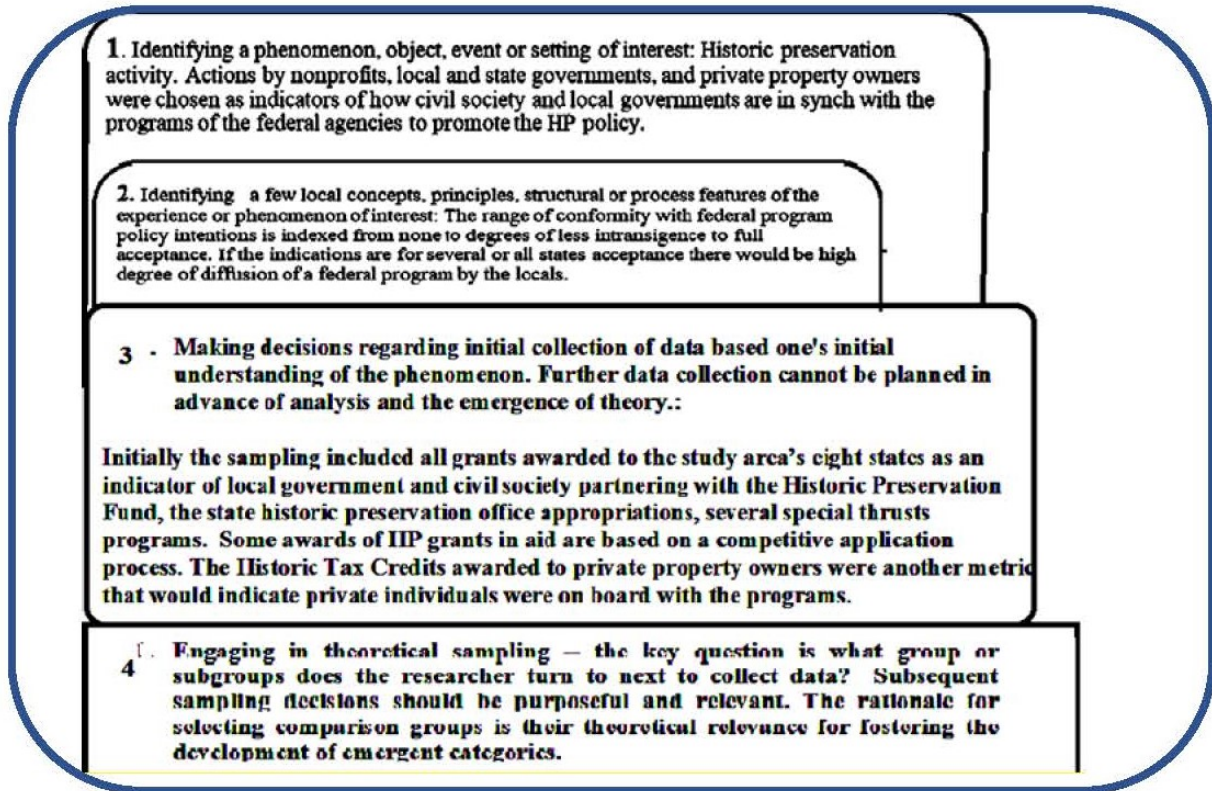


Figure 28. The Four Stages of Constant Comparisons

The contextual study will provide important data when combined with the Learning Places intervention's grassroots effort, which could impact the level of preservation activity going forward. Research methods designed for this dissertation reveal those factors hindering the utilization of the HTC. Gaining insights provides a clearer understanding of the regional dynamics that impact the preservation activity per state. The chosen methods consider the actions and attitudes of a diverse private sector. I examine conjectural hypotheses offered by expert interviewees and test them contextually by constant comparison methods. Using the CC method for the twenty years of data collected about preservation activity aims to find applicable working theories systematically.

The choice to use one geographic area of the United States, which I call the study area, was part of a multi-stage²³⁹ cluster sampling strategy. The cluster sampling from extensive government data about preservation grants subdivided the information into more targeted groupings. The Northwest, Northern Rockies, and Rural West states form the study areas to survey the data. Surveying official reports of annual grant awards by the federal government, states, and nonprofits' preservation programs can help confirm or reject plausible correlation theories.

Arrayed for illustrative purposes in the following table are the eight states in order of total population as the only variable. An example of the step-by-step workflow (see Table 9 below) that I used for the constant comparison method is illustrated for HPF and HTC—two federal programs diffusion of the intended policy and effects by the eight states in the study area.

²³⁹ A sample strategy for probability could involve collecting data in a multi-stage cluster sampling in which larger clusters are further subdivided into smaller, more targeted groupings for the purposes of surveying. By selecting a quadrant of the USA similar in most ways with that of Montana meant including adjacent rural western states of the Northern Rockies, Northwest. The eight states have only a few cities with diverse socio-economic profiles, all have vast areas that are sparsely populated amidst the rural western* geography. The built environment includes some states that have an average of less than 100,000 commercial structures as well as states with more than 100,000 buildings. Ranking the states activity in preservation using the data can make use of these independent variables.

Table 9. HPF vs. HTC Funding Level (actual findings will be shown in Chapter 5)

Pop. Rank	Grants HPF \$ / #	Rank \$ Grant / HTC	Historic Tax Credits (HTC)
1	WA \$ total and / qty. #	? / ?	WA \$ total and / qty. #
2	CO \$ / #	? / ?	CO \$ / #
3	OR \$ / #	? / ?	OR \$ / #
4	UT \$ / #	? / ?	UT \$ / #
5	NV \$ / #	? / ?	NV \$ / #
6	ID \$ / #	? / ?	ID \$ / #
7	MT \$ / #	? / ?	MT \$ / #
8	WY \$ / #	? / ?	WY \$ / #
	5 Year = \$ /#		5 Year = \$ /#

A unique quotient can be derived using ordinal ranking for the many variables and socio-economic factors germane to programs under study. To eliminate my own bias, I do not place a value but rank the states according to their reported performance or utilization of the programs offered by federal agencies, state historic preservation offices, and educational institutions. In these successive comparisons, I am seeking out an explanatory theoretic for preservation activity stratification per state in the Study Area to see what other factors affect the utilization of these federal programs and eliminate suggested theories in a structured way.

These comparisons started with creating a unique tabulated dataset because none existed that combined all federal programs for preservation activity together for comparison purposes. Thus, the total array of the twenty years of federal grant-funded projects, I call instances or observations, are listed as rows in the spreadsheet, with each state being a column.

Table 10 Grant-Funded Project Matrix Illustrates the federal grant instances per row and study area states per column with sources and annual budget notes. Funds source is identified and the annual subgrouping. The complete multi-page spreadsheet is in Appendix E.

Table 10. Grant-Funded Project Matrix

Anthrop. Collection	2008	-	-	-	-	-	-	-	-	UT		S.A.T.
State Collections	2008	-	-	-	-	-	-	-	-	UT		S.A.T.
Paul Dyck Buff. Cult.	2008	-	-	-	-	-	-	-	-	WY		S.A.T.
Hutchinson Ranch	2008	-	-	-	-	-	-	-	-	CO		S.A.T.
2008 Subtotal	2008	-	-	-	-	-	-	-	-			\$ in 1000s
Mason Court	2009	-	-	-	-	-	-	-	-	WA		S.A.T.
Westwood Thtr.	2009	-	-	-	-	-	-	-	-	ID		S.A.T.
Havre P.O. Court	2009	-	-	-	-	-	-	-	-	MT		S.A.T.
2009 Subtotal	2009	-	-	-	-	-	-	-	-			Great Recession
GRANT PURPOSE	YEAR	WA	CO	MT	OR	UT	NV	ID	WY	STATES	AMT.	TYPE

The procedures of this section stem from a methodical skepticism²⁴⁰ that challenges the key informant's assertions of probabilities that suggest conditions once re-aligned will produce more preservation activity. The analysis entails ranking the numerical data per state in the selected study area comprised of Montana, Wyoming, Colorado, Utah, Nevada, Idaho, Oregon, and Washington. By ranking the activity over time in these eight states, one can differentiate and scale the states' preservation projects of any origin, not just the HTC tax incentive program but also many other sources that imply more variables affecting the historic built environment and the political economy in those places.

Ethnographic analysis of the interviewees' responses meant notetaking, recording, transcribing, and coding responsee answers—whether academics, architects, property owners, and grassroots preservationists—for comparisons. For the research design, if the 'units' under investigation are interviewees, their number would show how many different professions work in the field and can serve as another independent variable.

²⁴⁰ King, Keohane, and Verba, *Designing Social Inquiry*. KKV suggestion: Four guiding themes will help develop better research designs: 1. Using observable implications to connect theory and data; 2. Maximize leverage; 3. Reporting uncertainty; 4. Think skeptically and use rival hypotheses.

Surveying official reports of annual grant awards by the federal government, states, and nonprofits' preservation programs can help confirm or reject plausible hypotheses by the experts. Inside the online course, observations recorded were numerical, verbal, visual, offering empirical data. For example, responders' completion of online surveys, for the pre-or post-surveys or the consent form, can be coded as per their degree of cooperation. By coding respondees' answers, their attitudes can be compared for changes, as can their online embedded test data. Other empirical observations give possible combinations for answers to the survey questions and their participation in the instructor's discussion posts. Outside of the online course, observations led the research to follow several different inquiry lines based on the offered hypothetical assumptions made by the experts²⁴¹ in historic preservation, public policymakers, past recipients of the Historic Tax Act incentive program, educators, private property owners, and their architectural consultants.

Part III. Conclusion of Methods

Will the analyses show why rural western states, like Montana, lag? Not necessarily since that question has so many answers that become conflated with other widespread concerns such as avoidance of federal entanglements, the pioneer myth of rugged individualism, lack of financial liquidity, rigors of the mandatory program requirements, subjective nature of the review process to be listed on the National Register, short-term versus long-term investment strategies, and level of identification with the local community heritage.

²⁴¹ Conjectural hypotheses came from interviewees who were experts in historic preservation, public policymakers, past recipients of the Historic Tax Act incentive program, educators, private property owners, and their architectural consultants.

For instance, one theory of lagging participation in the tax incentivized program is the red tape of the daunting requirements that are not user-friendly. The three-part application process eventually leads to filling in the ten lines of the IRS 3468 Form. The reporting of rehab costs must begin before 24 months and conclude 60 months later. The tax credits must be taken in five years of tax returns, thus dragging out the financial benefit per year.

The method I followed for finding out where the schools offered historic preservation courses helped establish the geographic disparity theory regarding architecture schools and universities. Broadening the search to all extant schools of architecture and universities was the next step. Unfortunately, not all schools of architecture have offered historic preservation tracks in their curriculum. This gap required compiling data from sources of research that led to the lists kept by many nonprofit organizations. They have, in the past, all published accredited schools' lists. In addition, the NPS has webpages about preservationists' education and a center called the National Center for Preservation Training and Technology.²⁴²

Examining whether more education or continued training in the subset of historic preservation could positively impact the level of civil society's preservation activities is one of many conjectural theories. Predicting an increase like that and especially the utilization of the HTC going forward was examined as well.

I deconstruct the following hierarchal tables for ease in following along as I present the actual results and findings; in Chapter Five, results for evaluation efforts: Formative: I. OCAT results; Summative: II. Participant Evaluation; III. REAP and IV. Contextual Comparisons:

²⁴² National Center for Preservation Technology and Training, n.d. www.ncptt.nps.gov.

Table 11. Table of Hierarchical Evaluations

Table of Hierarchical Evaluations				
I. Evaluation Purposes* and Data Collection Technique:				
	1. Assessing requires forming questions to measure concern. The online survey uses ten questions that are multiple-choice or open-ended. Using a deliberative opinion poll provides information about cultural resources, so the opinions that ensue are first informed and focused.			1. Notes: The goal is for long-term impacts. Assess how much longer the changes are in place.
	Evaluate at 3 Levels →	I. Program Evaluation	II. Participants Assessments	III. Preservation Activity Context
	(a) Most important are Outcomes that can Impact as measured by →	Participants' reflections can improve user experience (Ux) and support.	Specialized Knowledge. Transfer of learning. Change in K and Attitude shows a willingness to use new techniques for solving problems	Outcomes, benefits community with NR, Applying newly learned; theory to practice. How long did the changes last?
	(b) Voluntary Exit Survey →	Providing feedback to improve program sustainability.		
	2. Collect the evidence from the built-in function of the Learning Places on the Canvas LMS.			Note: Use quizzes and assignments. The LMS provides summary statistics analytics
	Evaluate at 3 Levels →	Use everyone as informed sources. Online experience data	Community hosts respond to LMS quick data output for comparison of online activity of participants.	Evidence of changes with community nonprofits becomes a data set provided by successive cohorts.
	3. Use alternative evaluation approaches matching the intervention nature and research question			Note: Mixed methods of qual. & quantitative.
	Evaluate at 3 Levels →	Six objectives Community of Learners	TPK Construct Knowledge	Changes over time from several cohorts

Table 11 Continued

	4. Gathering data; existing source tabulating indicators state-by-state variations			
	Evaluate at 3 Levels →	Analyze LMS online analytics formative strengthen plan/interface re-enroll	Pre-post surveys add reliability, and the use of a final summative survey adds accountability. Monitoring offers quality assurances of student's projects.	Interviews during the needs assessment of the field provide variables. These include quant. Or qualitative information on all significant areas of the citizenry for independent variability.
I.	ANALYSIS: the continuation of the 9 Purposes of Evaluation Table			
	5. With the three research questions and literature review, data is categorized and coded. Data inferences came from mixed methods; twenty years of HTC and HPF grants.			Note: Concern for reliability includes consistently collecting data; do the same thing for repeated measures.
	Evaluate at 3 levels →	I. Program Evaluation	II. Participants Assessments	III. Preservation Activity Context
		Codes and analyze Define concepts	Oral interviews Good data	Needs assessment; constant comparative method; develop concepts; model of federal funding utilization; look for patterns.
	6. Stipulates criterion for judgments or to arrive at criteria		Note: Emerging criteria recording or identifying relevant textual or tabular data: linked by a common theme or idea allows indexing by categories.	
	Evaluate at 3 Levels →	The program has unique rubrics for assessments.	Completion = 80%. Use % Passing vs. Incomplete Score	Policy changes at the local level; preservation activity is denoted.

Table 11 Continued

	7. Timeline, Budget; Stepwise Modules			Note repeat test after 12 mos.
	Evaluate at 3 Levels →	Program cost for users is minimal in time and free tuition. Community hosts receive pro bono services.	The quantified baseline reveals TPK, prior knowledge, and attitude assessed qualitatively and reassessed at the end.	Qualitative: Transfer learning revealed that users apply new knowledge. Peers assess each other in preliminary; the community provides a final survey evaluation.
	8. Monitor going forward judgments about value, worth using data gained for future purposes.			
	Evaluate at 3 Levels →	The monitor evaluation process, monitoring episodes	Transfer of learning applied in professional life.	Determine values with stakeholders, sponsors, consultants/instructors.
	9. Ensure the information from the evaluation is used			Note: use Appreciative Inquiry
	Evaluate at 3 Levels →	Addresses causes; Action Plan for future cohorts; alleviates effects.	Recommend feasible changes; oral history; interviews add to record.	Info. Flows from findings; solutions to problems; invite others' solutions; responsive to optional solutions; ensure change; affordable.

CHAPTER FIVE

FINDINGS AND RESULTS

Part I. Introduction to Results

I expected the full implementation of the methods to provide results and findings to ensure that the Learning Places is sustainable and a permanent educational intervention. It was designed to be repeatable by former students for their modules related to other geographic regions, scalable, and ready for more marketing and publicity. It is a social entrepreneurial cooperative endeavor based on the two prototypes. The first tested was the D2L version called Saving One Room Schoolhouses and involved sixteen volunteers. The current version, called Learning Places, has had forty-two enrollees testing the latest iteration published on Canvas by Instructure's LMS. The first version tested well over an initial year of research, and the second is being tested now for two years, with continued enrollments going into the third year. The results and findings will show how the choice of an online platform was an efficacious choice to deliver what I found to be missing in the continuing education offerings for historic preservation.

Presenting the findings and results is best begun by recalling the previous chapter's list of the four main methods and how they can help find answers to the three research questions. This chapter has the layered approaches of the four methods that will address the problems found to be hindering society's support of national historic preservation policy, programs, and the use of incentives. The incentive program most touted to be the most significant intervention for promoting historic preservation is the HTCs administered jointly by the NPS and IRS through every state's historic preservation office. Unfortunately, despite its reported successes, they are

not uniformly distributed across all fifty states. The intervention called Learning Places, designed to bridge those gaps with educational modules comprised of a unique syllabus identified as IDEALS has had graduates providing exemplary outputs about learning places they chose for their project.

The following are the sections of results and findings based on the selected methods previously described in Chapter Four:

I. Introduction to the Results and Findings

II. Formative and Summative Evaluation. Results and Analysis

Part II..1. Formative Evaluation: OCAT Recommendations.

Part II. 2. Learning Places Functional Development

Part II..3. Summative Evaluation: Competency Results for Knowledge /
Attitudes

III. REAP and Constant Comparisons Methods

Part III.1 Rapid Ethnographic Assessment Results

Part III.2 Constant Comparison Methods Findings.

The assessments described in Chapter Four measured the participants' changes in three key competency areas: Knowledge, Attitude, and Behavior. Those results are in Part II of this chapter. In addition, it features results from the pre-course, and the Canvas LMS automatically collects post-course surveys, quizzes, participation rates, and assignment completions. I downloaded the reports and provided my analysis, and this chapter contains samples with more included in Appendix E.

Because of those outputs, Chapter Five provides findings and results to help answer the three research questions.

R.Q.I: How can a grassroots effort use online service-learning courses technology for volunteers' continuing education, contribute to practitioners' needed competencies to help save cultural resources?

R.Q. II. Can an online service-learning course help address the lag in the rural western states when it comes to applying for incentives to help qualified preservation projects?

Figure 29. Research Questions I and II

The intervention was tested as a proof of concept that there can be a grassroots way to mitigate the dynamics of neoliberalism, develop more competencies for a public sector that wants to have more agency, and help civil society be more aware of the benefits of historic preservation. A third research question asked if measurable growth would follow from the efforts by volunteers, both in their competencies and, in fact, for the resiliency of their communities.

As a result of the research, the third question itself morphed with the feedback and now reads as follows:

RQ III: To what degree do the forms of knowledge, in conjunction with resulting attitudes and behaviors, result in more preservation efforts, in turn, contributing to more resilient communities?

Figure 30. Research Question III

Constant comparisons of the contextual background yield quantitative and qualitative data when combined with the REAP methods for the chosen eight-state study area; it helps me

provide a context for my analysis. In addition, now that I have created the model for one study area course, participants can do a similar contextual background for any other region.

Table 12. Charting the Problems Hindering HP and Logic Model Components of the Solutions

1. Cited Problem →	Neoliberalism	Authority vs. Agency	Aware Civil Society
3. Obstacles →	Price is the only value of the marketplace	Uneven educational opportunity	The transitory and displaced populace
2. Design Solutions →	A new grassroots organization	Competency Changes for K, A, B.	More inclusive heritage conservation
4. Outputs	Digital public space	Certification of HSW	Act locally case study
5. Outcomes →	Community of learners	Conservation Architect	Culture Corps
6. Long Term →	Preservation action and National Trust advocacy	Expertise as Conservation Corps	Community-based monitors/surveyors

Table 13. Relevant Sections from the Table of Hierarchical Evaluations and Analysis

6.	6. Stipulates criterion for judgments or to arrive at criteria		Note: Emerging criteria recording or identifying relevant textual or tabular data: linked by a common theme or idea allows indexing by categories.	
	<i>Evaluate at 3 Levels</i> →	The program has unique rubrics for assessments.	Completion = 80%. Use % Passing vs. Incomplete Score	Policy changes at the local level; preservation activity is denoted.
7.	7. Timeline, Budget; Stepwise Modules		Note repeat test after 12 mos.	
	<i>Evaluate at 3 Levels</i> →	Program cost and ease of use for learners are appropriate in time commitment and free tuition. Community hosts receive pro bono services.	The quantified baseline reveals TPK, prior knowledge, and attitude assessed qualitatively and reassessed at the end.	Qualitative: Transfer learning revealed that users apply new knowledge. Peers assess each other in preliminary; the community provides a final survey evaluation.

Part, II Formative and Summative Methods

Formative and summative evaluation results and analysis are presented in Part II. The first Part II.1 looks at the organizational capacity assessment results to the formative evaluations primarily relying on OCAT by McKinsey tools for nonprofits. The other parts of this section are Part II. 2. Learning Places Functional Development Report and Part II.3. Summative Evaluation: Competency Results.

Part II.1. Organizational Capacity Assessment Results

This introduction contains some results and findings from the functional aspects of assessing the online course in a formative method. In addition, the organization of Learning Places as a nonprofit program is subject to another formative evaluation in Part II.1. In that first section of Part II, the McKinsey assessment results follow the use of OCAT for the new Learning Places organization's capacity based on an exhaustive questionnaire.

I update that earlier OCAT report and use its references for training aids. In addition, I will archive and update the changes made since the outset of the online course and the outreach engendered due to the launch of the course using Canvas' LMS and becoming a sponsored nonprofit project of CN!. Finally, the McKinsey OCAT method results measure how well the new program has been organized and helps answer RQ1, concern for the efficacy of a grassroots effort, and the technologically aided continuing education effort to transfer learning.

With the first two years of participants engaged in the online course Learning Places, there are sufficient findings that this intervention can lead to building competencies and attitude changes while using the tools for historic preservation available throughout the curriculum. How to best design and support the online presence while growing the capacity of Learning Places as

an innovative program was answered with the formative evaluations using McKinsey's OCAT. Besides the program's functionality evaluation, I added Method Two as a summative assessment of the impacts or outcomes of the participant competency gains in K, A, B. Taken together; they can combine answers for RQ1. The formative and summative methods results may only provide aids to extrapolate a range of future impacts. Since Learning Places was a project with long-term goals of being a sustainable nonprofit program, it will be repeatedly subjected to an OCAT.²⁴³ McKinsey developed the OCAT tool for nonprofits that foundations were assisting in their early formative years. It can help develop a viable program in the ten aspects of an organization that McKinsey felt were critical for upgrading with coaching. The OCAT results are in the first findings section for Program Evaluations in quantitative, chart, and narratives.

Generally, the OCAT was helpful as it assessed the Learning Places' organizational strengths and weaknesses and provided recommendations. This early diagnostic OCAT report was done as a self-diagnostic before choosing the next course of action to make Learning Places more sustainable as a project fiscally sponsored by CN! a 501(c)3. In the following excerpts from the thirty-eight-page final assessment report, responses are averaged into a score per aspect of the ten significant faculties that make for a successful organization.

The charts and tables present the indicators for the needed changes before a new program can realize its strategic goals. Suggestions are made for longer-term goals of growth. I was able to get a perspective of strengths and weaknesses using the seven elements of organizational

²⁴³ McKinsey's OCAT was used to self-measure the strengths and weaknesses of Learning Places using the organizational capacity assessment tool. I selected the tool developed by the McKinsey corporation and known as their Capacity Assessment Grid. It was available online but is no longer supported by McKinsey as a tool for helping non-profit organisations assess their organizational capacity. It served my organizational development as a formative evaluation.

capacity and their components. I was able to use it as a newly sponsored nonprofit organization project leader who welcomed the results. The choice of being sponsored by an existing regional nonprofit has already added to the capacity-building efforts that scored poorly; see below.

Category	Score	Level
1. Aspirations	3.75	High level of capacity in place
2. Strategy	3.15	Moderate level of capacity in place
3. Funding	1.82	Basic level of capacity in place
4. Leadership, Staff and Volunteers	2.98	Moderate level of capacity in place
5. Values	3.71	High level of capacity in place
6. Learning and Innovation	3.75	High level of capacity in place
7. Marketing and Communication	3.30	High level of capacity in place
8. Managing Processes	2.42	Basic level of capacity in place
9. Organization, Infrastructure and Technology	3.00	Moderate level of capacity in place
<u>Results</u>		

Figure 31. OCAT Scores for all Categories Nonprofit Capacity Building

The charts above and following are the averages of scoring the response to each of the over 130 assessment questions to determine the organization's strengths and weaknesses designed for Learning Places to carry out its mission. The highest-scoring category of the nine was 1. Aspirations; 6. Learning and Innovation, 5. Values. These three had the highest capability from the start of the program.

Next in the assessment, that scored a moderate level of capacity were: 7. Marketing and Communication; 2. Strategy; and 9. Organization, Infrastructure, and Technology. The categories at the most basic level and clearly in need of assistance were: 4. Leadership, Staff, and Managing Processes. OCAT priorities for Learning Places include a feedback loop for using communications, like surveys, for improvements.

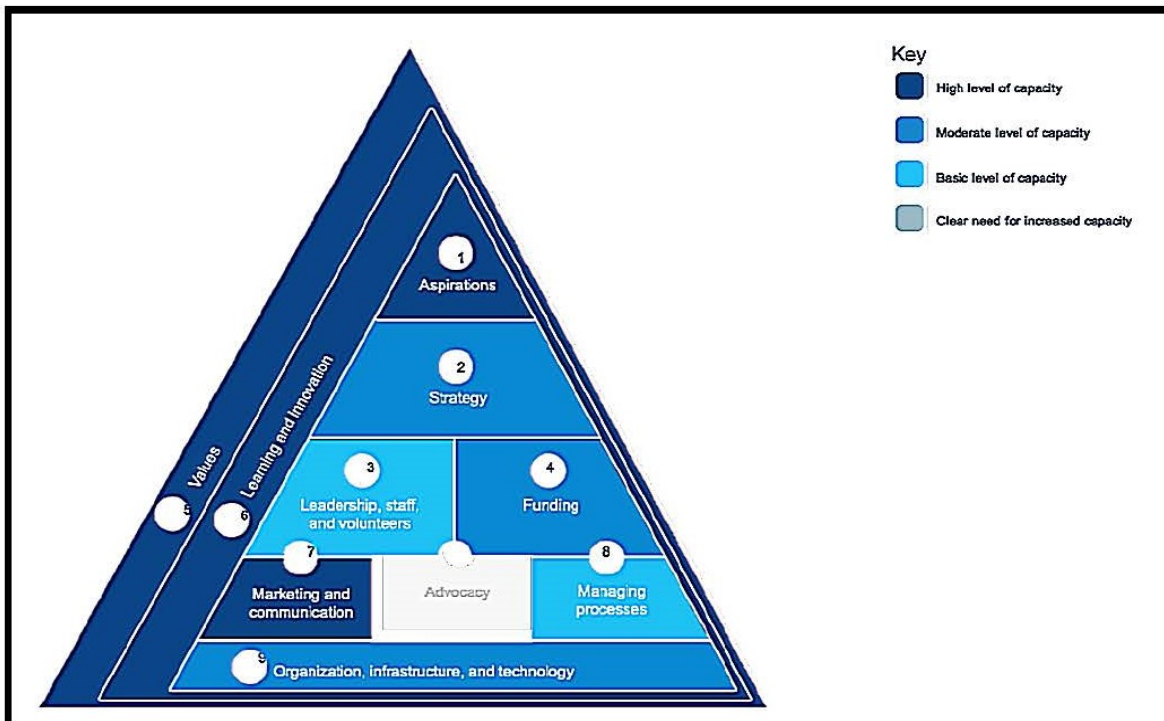


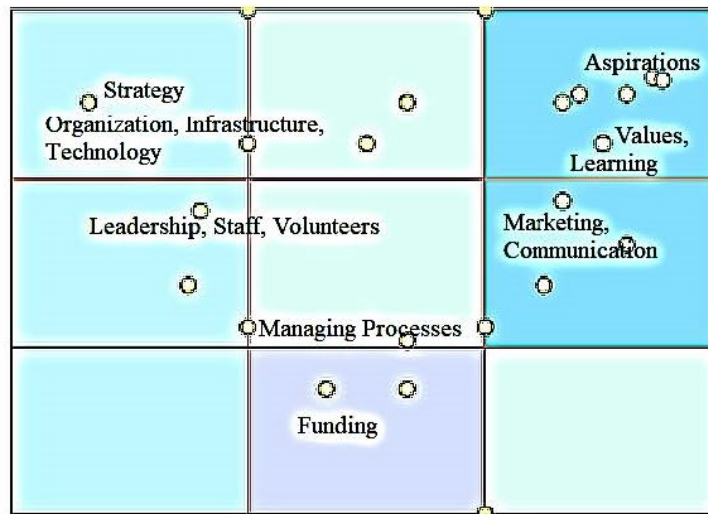
Figure 32. OCAT Pyramid of Results for Levels of Capacity

Identify priorities

Identify priority discussion topics based on average rating and level of consensus

Capacity ratings and consensus levels, plotted on an X-Y axis, provide a visual representation of your organization's self-assessment, and offer direction in four different action categories.

All Categories



Four Directions
Action Categories Legend

High Capability =



Moderate " =



Basic Level =



Clear Need for
Capacity =



Figure 33. OCAT Priority Discussion Topics

Prioritize capacity			
Where you need improvement Your organization has a low average score with regard to the following capacities. There is likely a clear need for increased capacity in these areas.		Guiding questions What factors led to the development of these shortfalls in capacity? How can we improve on our capacities in these areas? How can we incorporate lessons from these areas into future strategy?	
Category	Question	Score	Consensus
4. Leadership, Staff and Volunteers	4.3. How effective are the CEO/ED and leadership team? Show answers → ()	2.00	
4. Leadership, Staff and Volunteers	4.6. Are the right people on the Board with the right level of engagement? Show answers → ()	1.75	
4. Leadership, Staff and Volunteers	4.10. How well do we bring in talent? Show answers → ()	0.00	
3. Funding	3.1. Do we have a sustainable funding model that enables growth? Show answers → ()	1.80	
3. Funding	3.2. Do we manage our budget effectively? Show answers → ()	1.33	
8. Managing Processes	8.3. Are our programs adequately staffed and resourced? Show answers → ()	2.00	
8. Managing Processes	8.4. Do we have the systems in place to execute our programs effectively? Show answers → ()	2.00	
9. Organization, Infrastructure and Technology	9.3. Do we have technology that enables our work? Show answers → ()	2.00	

Figure 34.OCAT Results for Prioritizing Capacity

Learning Programs entry into the continuing education field as a program is by definition a Task-Oriented Organization. The focus on a predefined target and the use of ad hoc abilities to master tasks is the reported stage of the nascent program, Learning Places. The next level, called a Capability-Building Organization, has an aspiration for the longer-term development of capabilities in addition to the initial targets. Learning Places can achieve the next level of predefined targets to become more sustainable by attaining more capability. Finally, a Learning

Organization redefines its targets based on context. Collectively the organization identifies and develops whatever is necessary for achieving evolving targets with the newly learned capabilities.

According to the McKinsey prescriptions, the OCAT data and recommendations can be revisited as the program matures until it reaches the ultimate state of being a Learning Organization. McKinsey tutorials placed the average scores for Learning Places at its early stages of development that were not out of line with what expectations for new nonprofit. The McKinsey report's other aspects are recommendations for building the capacity clearly in need of improvement. The four weaknesses could follow the McKinsey formulations for building the organizational capability for its needs of infrastructure, technology, volunteers, staff, leadership, managing processes, and, most in need, funding. A table shows the priority capacity needs in Appendix E.

Part II.2. Learning Places Functional Development

Before designing my online course, I researched the mode of delivery and evaluated my predisposition and preparation to be an online educator. A warning "...teaching well online is more time-consuming than teaching face-to-face"²⁴⁴ proved to be confirmed before the launch of the course. I estimate two hundred hours to transfer the original online course from D2L to Canvas LMS and the new curriculum that broadened out from Saving One Room Schoolhouses to what is now more generic and accessible called Learning Places.

²⁴⁴ M. T Keeton, "Best Online Instructional Practices;," *Journal of Asynchronous Learning Networks*, Report of phase I of an ongoing study., no. J8(2) (2004): 75-100. Montana State online faculty training and evaluation

The online educator webinar²⁴⁵ and self-assessment suggest that a multidisciplinary team should teach how to deliver an online course, and the training sessions include online andragogy (preparing teachers of adult learners).

The goal is to facilitate learning about how to improve student's interaction, manage their expectations. Lastly, online training sessions and practice will help one acquire the technical skills of navigating a new technologically aided instructional system. The first online course for the practice course and lesson plan for the one-room schoolhouses received feedback on the integration of technology:

the historical preservation/American Studies unit plan incredibly thorough, but the accompanying tech rationale provides a detailed yet crisp argument for your use of the technology to support teaching and learning. And most importantly, that argument is deeply rooted in research and pedagogical practices to support why you included the technology.²⁴⁶

As a new online course developer, I took away some salient lessons²⁴⁷ for my next project and repeated them for others to use:

- The goal is to facilitate learning about how to improve student's interaction, manage their expectations.
- Lastly, online training sessions and practice will help one acquire the technical skills of navigating a new technologically aided instructional system.

²⁴⁵ Montana State University offers the webinar for prospective online educators. “*Making the Move to Online: Successful Instructors Speak*”. MSU Extended University, n.d.

____ Faculty Self-Assessment: Preparing for Online Teaching. Weblearning@psu.edu, n.d.

²⁴⁶ The MSU Creative Integration Technology course EDCI 551, 2013 faculty Nicholas Lux quote.

²⁴⁷ J. Boettcher and R. Conrad, *The Online Teaching Survival Guide, Simple and Practical Pedagogical*, 2010. Used in Dr. Marilyn Lockhart's lectures EDLI 2013

Also see *Design Your Online Course*. Online source at <https://cdl.ucf.edu/teach/strategies/course-design/>

- Begin planning your online course by identifying the overall goal(s) and analyzing the purpose
- A strong understanding of the needs of your learners and how your course can meet those needs is important. Consider what you want your students “to walk away with” at the conclusion of their coursework.
- All your course objectives, instructional strategies, content, and assignments should facilitate learners’ attainment of your course goal(s).

The advice received included “the following questions to consider as you begin planning your course,” and I will provide what I learned as a result of using them:

- What are your learners’ characteristics?

I requested the volunteer service learners to provide a brief resume of their background in HP, online courses, and working with the SOI standards. Having limited responses to that request meant I needed a workaround to search publicly available social media presence based on the email address as an identifier. That route proved partially successful but was limited by a lack of consent forms.

- What types of learning are involved?

I chose asynchronous with moderation by myself as an instructor and partial face-to-face with community hosts by learners. The six volunteers were placed in each cohort and were required to post discussion questions and answers that proved only to have minimal use.

- What content and information are needed to facilitate learning²⁴⁸?

Content resources were provided online through the course, including limited required reading, six modules of technics aimed at increasing competency and the standards for use on historic rehab projects, and my rubrics to evaluate the SOI Stds. Data displayed on the following section's pages of tables show what is gleaned from the Canvas tracking of Quizzes, Assignments, and page views. In this way, I can appraise the commitment to learning by users.

- What tasks do learners need to master to achieve the overall course goal(s)²⁴⁹?

Each module was viewed by only a few learners; therefore, most learners did not use all six modules that contained the lesson plans with technics that needed to be mastered and tested before completing the final report at the end of the course.

- What sequence of content and activities is needed²⁵⁰?

I used the IDEALS stepped syllabus structure to help learners construct their knowledge, and the results were varied as the learners picked what was of interest to them but not completing the six steps for the most part.

- What technologies are available and best suited to present the content to facilitate learning²⁵¹?

Using embedded video in the Canvas LMS proved of limited interest as only some viewed it. Therefore, any follow-up quiz questions were rendered moot by lack of

²⁴⁸ Design Your Online Course | University of Central Florida. <https://cdl.ucf.edu/teach/strategies/course-design/>

²⁴⁹ Ibid

²⁵⁰ Design Your Online Course | University of Central Florida. <https://cdl.ucf.edu/teach/strategies/course-design/>

²⁵¹ Ibid

participation. Other links to lessons from nonprofit organizations broadened the lessons of how to work with communities and present final reports. These are permanently linked to the LMS resources and will be updated with newer versions. The results of users' view counts will inform my choice of new lesson content when developing new modules. See the tables below in Part II.3 covering the participation of online service learners.

Part II.3. Summative Assessments: Competency

1. Assessing requires forming questions to measure concern. The online survey uses ten questions that are multiple-choice or open-ended. Using a deliberative opinion poll provides information about cultural resources, so the opinions that ensue are first informed and focused.			Notes: The goal is for long-term impacts. Assess how much longer the changes are in place.
<i>Evaluate at 3 Levels →</i>	<i>I. Program Evaluation</i>	<i>II. Participants Assessments</i>	<i>III. Preservation Activity Context</i>
(a) Most important are Outcomes that can Impact as measured by: →	Participants' reflections can improve user experience (Ux) and support. Providing	Specialized Knowledge. Transfer of learning. Change in Knowledge and Attitude shows a willingness to use new techniques for solving problems	Outcomes, benefits community with NR, Applying newly learned; theory to practice. How long did the changes last?
(b) Voluntary Exit Survey →	feedback to improve program sustainability		

Figure 35. Relevant Sections from the Table of Hierarchical Evaluations/Analysis.

Seven of the first year's thirty enrollees completed some of the six objectives. To calculate the first year's participation rate, use the equation: %Participation = seven / 6 objectives x 30 participants totaling 180 workforces.²⁵²

Table 14. Measuring Outcomes for Evaluating the First Year of Online Learning Course Details

MEASURING OUTCOMES FOR EVALUATING THE FIRST YEAR OF ONLINE LEARNING COURSE: IDEALS						
COURSE OBJECTIVE	Cohort One Apr. '19	Cohort Two June '19	Cohort Three August '19	Cohort Four Oct. 2019	Cohort Five Dec. 2019	Summary 2019-20
1	0	0	0	Yes	Yes	2
2	0	0	0	Yes	0	1
3	0	0	0	Yes	0	1
4	0	0	0	Yes	0	1
5	0	0	* ²⁵³	Yes	0	1
6	1 ²⁵⁴	0	0	Yes	0	1
Enrollment	3	3	6	6	12	7/30

Cohort Objective and Results for First Year. In the first year after the online course launch, I realized that many of the first thirty enrolled students were from an older generation with little or no experience with structured long-distance courses and could have difficulty navigating through the cyber requirements. Therefore, I needed an instrument to discern the learner's preparation and experience in the first few screens of the online course. The following is an excerpt from the course.

²⁵² Vygotsky, *Mind in Society: The Development of Higher Psychological Processes*. TPACK is likened to ZPD or zone of proximal development as important to ascertain about a new learner's readiness.

²⁵³ Three service learners requested a postponement of their enrollment to a later cohort

²⁵⁴ As participant teacher I achieved 1.25 HSW from AIA via the HPEF through the link embedded in the course. AIA Continuing Education System Quizzes (rated at 1.25 HSW each), Additionally, a field exercise using a matrix for defining cultural landscapes as per Dr. Donald Meinig was completed for another CEU. Creating an online course and teaching for a semester is also worth fifteen HSW credits.

Fill out the Pre-course Online Survey if you have not already done so by clicking on the following link: <https://www.surveymonkey.com/s/SS5FPPV> [Links to an external site.](#)

Figure 36. Pre-Course Online Survey Link

2.	2. Collect the evidence from the built-in function of the Learning Places on the Canvas LMS.			Note: Use quizzes and assignments. The LMS provides summary statistics analytics for all users,
	<i>Evaluate at 3 Levels →</i>	Use everyone as informed sources. Online experience data	Cohort's community hosts respond to the open-ended question. LMS gives quick data output for comparing the online activity of participants.	Evidence of changes with community nonprofits becomes a data set provided by successive cohorts.

Figure 37. Course Hierarchal Assessment Grid Segment

Relevant Sections from the Table of Hierarchical Evaluations and Analysis

The introduction to the course asks for a brief resume from the enrolled to reveal their past experiences in historic preservation, cultural resource management, architecture, voluntarism, and online course/social media. If they offered that information, it is noted and indexed with their Learning Places level of involvement. Observing a substantial number of older enrollees who had withdrawn from the course without engagement with the content puzzled me. I wondered what caused the behavior that some called ‘resistance.’

Table 15. Learning Places Online Data Collection of Attendance Statistics

Learning Places Online Data Collection of Attendance Statistics: aka Bounce Table			
	Lowest Rank	Midrange Rank	Higher Rank
Number of Learners	6	4	3
Score per learner	5, 8, 9, 12, 13, 14	13,17,17,18	15, 16, 18, 21
Time in Course	Less than 4 minutes	Less than 35 mins.	1 hour to many hours
Pages viewed	< 11 pages viewed	Under 50 pgs.	60 to 220 avg. 120
Known Ed Level	Educated	Unknown	>1-year HP avg.
Geography	Rural	Unknown	Unknown
Genders	4 m, 2 f	15 m /15 f	Unknown
Age Group Est.	>50 yr.; one m.>60 yr.		>60 yr.
Online Prepared	Email, social media	No online presence; 1 social media	2 of 4 had Blogs
HP prepared	Unknown to None		1 yr. + avg.
Licensed Architect	One known of six	3 of 4	unknown
Total Score	Score 61 cumulative.	Score: 65 cumulative	Score 70 cumulative
Total minutes	Est. .5 hr. / <50 pgs.	Est. 2 hr. / 70 pgs.	Est. 4 + hours
Total pages			

Without their input, resume, consent form, or prior experience profile, the task of customizing by the instructor was more difficult. Thus, partial indexing of the available factors about enrollees who were early to withdraw had to suffice. The table above is based on those anonymous enrollments.

7. Timeline, Budget; Stepwise Modules			Note repeat test after 12 mos. Qualitative: Transfer learning revealed that users apply new knowledge. Peers assess each other in preliminary; the community provides a final survey evaluation.
7.	<i>Evaluate at 3 Levels →</i> Program cost for users is minimal in time and free tuition. Community hosts receive pro bono services.	The quantified baseline reveals TPK, prior knowledge, and attitude assessed qualitatively and reassessed at the end.	

Figure 38. Module Three Hierarchal Segment

New enrollees tell me experience levels in the best situation, which helps predict the assumed zone of proximal development²⁵⁵ / (TPACK²⁵⁶) if there was enough information. Unfortunately, collecting biographical data was limited without consent forms. Therefore, I used some of the REAP. When it came time for enrollees to assess the course and give feedback, ideally, they should report on difficulties early and often. Figure 39 contains the essence of the experienced learner's advice to the newcomer to Learning Places. Without prior knowledge of preparedness, the facilitator only sees progress by Canvas' recording rates of participation.

²⁵⁵ Vygotsky, *Mind in Society: The Development of Higher Psychological Processes*.

²⁵⁶ Lux, Waterton, and AW Bangert, et al, "The Development of an Instrument to Assess Preservice Teacher's Technological Pedagogical Content Knowledge."

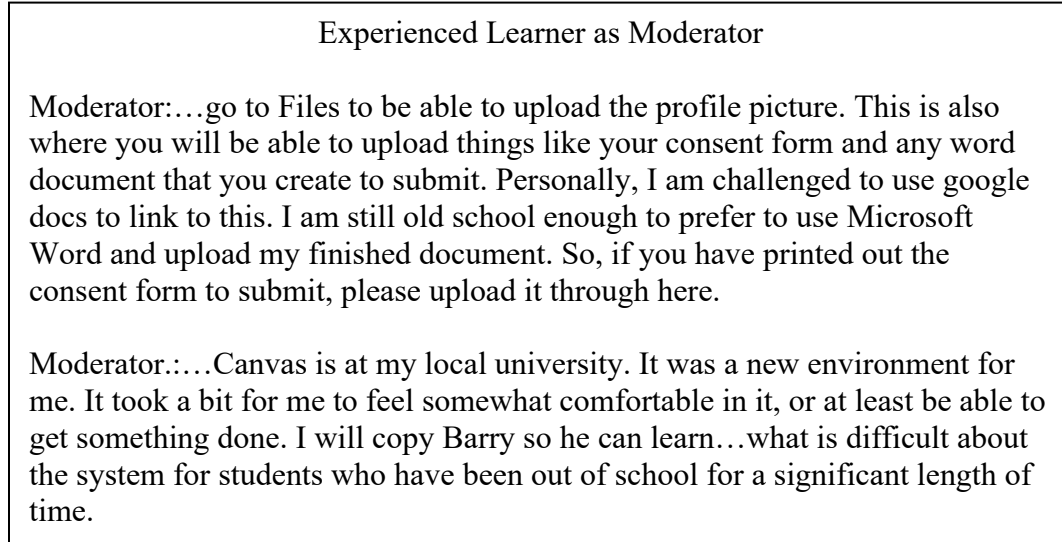
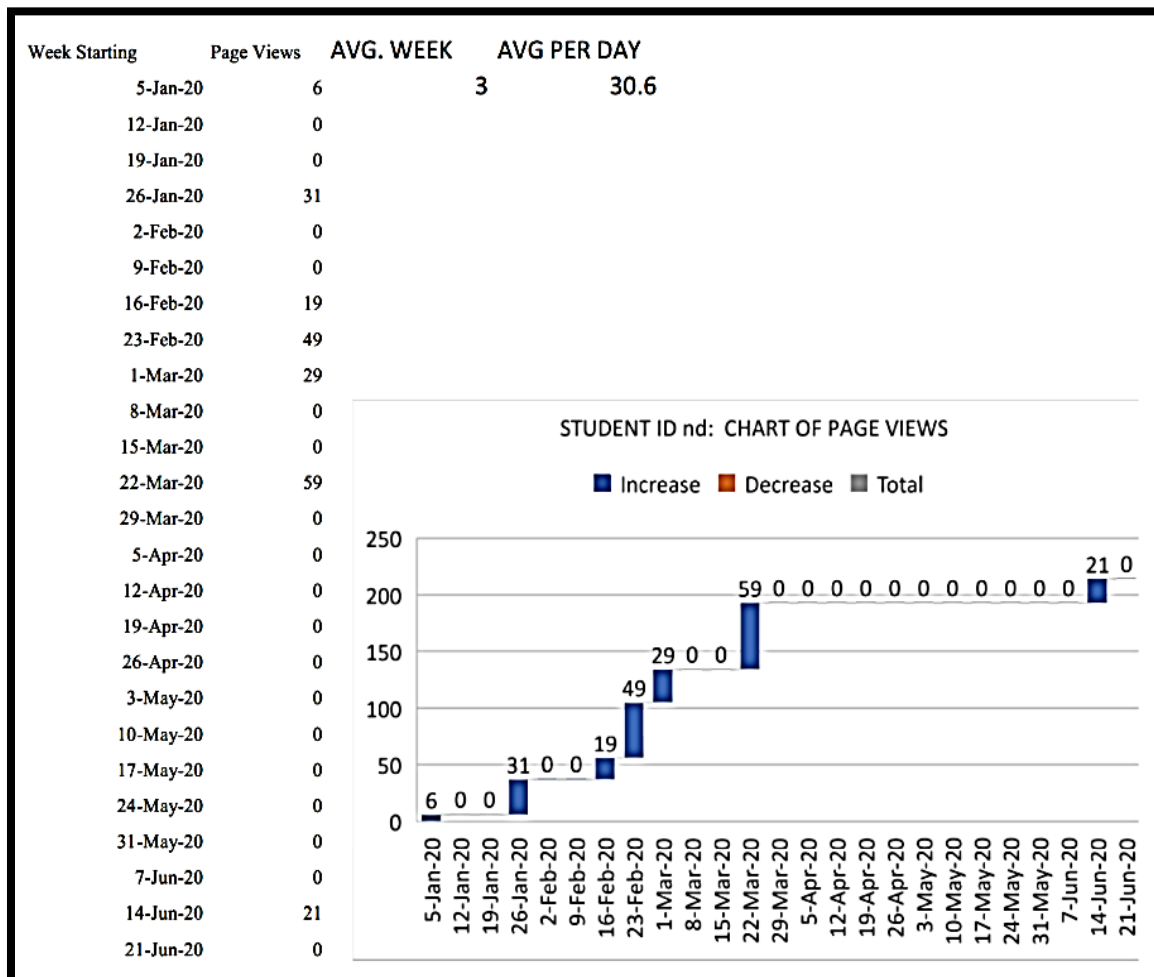


Figure 39. Experienced Learner Discussion Posting for Learning Places Newcomer

The participation rates tracked by Canvas proved to be helpful for diagnostics. The chart shows how the new learner did not get started with ease. Users may have difficulty with a less than user-friendly online learning system if they are new to it. This learner's calls for help were done with email rather than on the course messaging board since the newcomer was unfamiliar with Canvas' website. (See Figure 39)

Table 16. Participation Rate for an Online Learner



The first transcribed observations provide a typical exchange on how to navigate the online system. It revealed that the week's moderator's preference for old-school workflows rather than a new procedure via 'Google Mod's' advice helped the newcomer overcome an obstacle about the required submission of the signed consent form, thus enabling me to use these discussions posts.

This complaint was a common one from more than one newly enrolled and older learner. By comparison, a younger learner at a university job submitted the consent form with apparent

aplomb. Therefore, it was a mixed issue that could have been avoided by enrolled learners sharing their degree of experience with digital apps and online tools. If I had known, I might have been more adept at placing the new service learners in a more remedial module. With more experience, my course design ability and talent in Ux, user experience, and techniques could make the navigation online a bit smoother and more intuitive. This area needs strengthening in future revisions and the design of new modules.

3.	3. Use alternative approaches for evaluation that matches the intervention nature and research question		Note: Mixed methods of qual. & quantitative.	
	<i>Evaluate at 3 Levels →</i>	Six objectives Community of Learners	TPK Construct Knowledge	Changes over time from several cohorts

Figure 40. Relevant Sections from the Table of Hierarchical Evaluations and Analysis

Does distance learning have a role in improving historic preservation activities by those enrolled in the course? Did their Knowledge, Attitude, and Behavior change in measurable ways to help prove the efficacy of using distance education technologically enhanced media? A template taken from the Department of Education’s Office of Educational Technology²⁵⁷ helped with the summative assessments of the impacts and outcomes of the program evaluation.

The department’s suggestions for the online learners’ assessments—in terms of the level of evidence from low to high—guided the table for students actual learning benchmarks while attending Learning Places are in the following table:

²⁵⁷ “Office of Education Technology: General Principles of Effective Practice in Online Professional Learning.”.

Table 17. Department of Education Guidance for Online Educators

Level of Evidence	Dept. of Education Guidance	Learning Places
Low-level evidence	1. Certificate of participation or badge. 2. Archive of the webinar	1. Self-enrollment confirmed placement in a cohort. 2. Re-enrollment then continue until completed
Medium-level evidence	1. Results from a quiz or test based on the content covered. 2. Completed template that demonstrates learning acquired	1. Quizzes' scores maintained for tests taken. 2. Midterm and final shows progress through all six modules
High-level evidence	1. Portfolio of artifacts created during the course (e.g., discussion threads and chat transcripts) 2. Artifacts of project work 3. Reflections captured on blogs, videos, etc., to show evidence value-add way for credentialing awarding learning credits. 4. Documented change in practice and corresponding effect on students related to new knowledge and skills resulting from participation.	1. Identified choice of cultural resource photos and narratives start the stepwise learning. 2. Pin-up and crits for preliminary 3. Sample of a Google Site ²⁵⁸ learning places archive Google Site 4. Archives will be updated with the annual call for new preservation activity by alumni. Six learning units for completion of six modules

The summative assessments of the impacts or outcomes of the program reports of the first two years after launching the Learning Places course are compared to another online resource for preservation educators by Local Preservation School (LPS).²⁵⁹

²⁵⁸ Barry Sulam, "Learning Places!," google sites, *Learning Places Google Sites*, (2018), <https://sites.google.com/view/learning-places-canvas-home-1/home>.

²⁵⁹ Eli Pousson, "Local Preservation School," n.d., <https://localpreservation.github.io/>.

The NPS and National Conference of State Historic Preservation Officers, National Trust were joined by other contributors, including Johns Hopkins University and a host of peer reviewers, to fund an educator's preservation toolkit online.

Table 18. Comparison Between the LPS and Learning Places: Courses Using Open Sources

Table 1 Comparison with Online Course using Open Sources		Higher Ed Standards	
	LPS is The Local Preservation School	LP is Learning Places	ACSA / NCPE
1	<u>Introduction</u> The Local Preservation School is a collection of open educational resources for preservation advocates and volunteers. We created this collection to engage and support people interested in learning how to save and sustain historic places within their communities., is intended to reflect our inclusive understanding of the people interested in learning about preservation online. We sought to build open educational resources that	<u>Introduction</u> Learning Places is an online source of continuing education for architects and anyone wanting to help Save Cultural Resources by Learning Places. A community of learners can learn a core syllabus I.D.E.A.L.S for professionals seeking	<u>Introduction</u> ACSA has no specific recognition of architectural school HP curriculum. An accredited school ought to offer some electives and a history of architecture survey course. As there is no official accreditation body for our field, NCPE serves to ensure that our member programs

See the comparative results on a chart sample above and in full in Appendix E. The LPS final report serves as a model of a thorough summative evaluation for their grant-funded initiative. I compared the two programs' online-delivery methods of HP curriculum with the National Council of Preservation Education standards for membership. The presentation in the tables can be updated for repeated analysis for a longitudinal study and grant writing.

An analysis of the surveys pre-and post-course using the Survey Monkey format are tabulated in Appendix E. Summarized data is presented in the following excerpts below the chart sample.

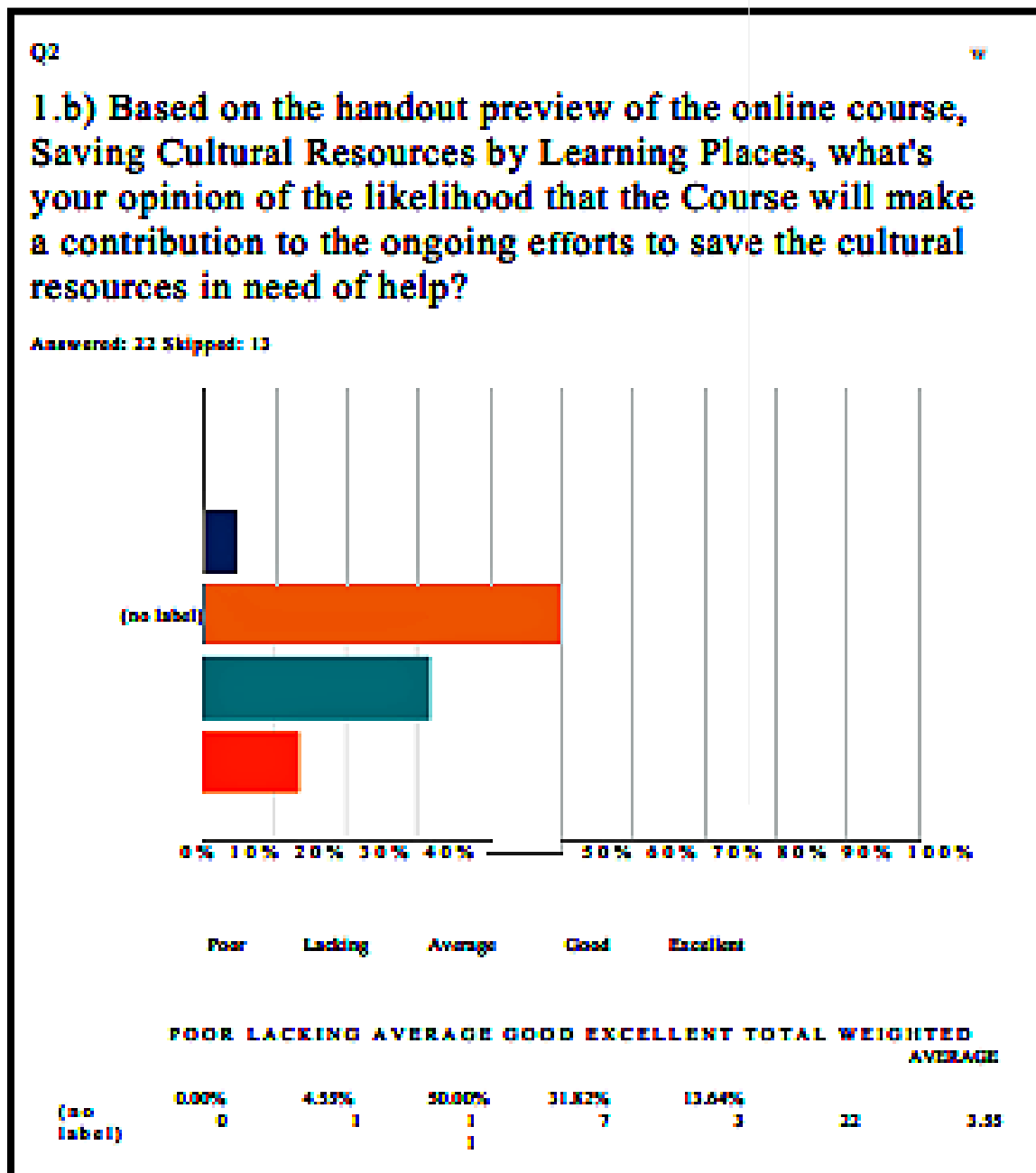


Figure 41. Results of Survey Question 2.1.b

Result of Survey Question 2.1.b.: The twenty-two respondents' mean index of 3.55 meant there was an average to a good chance that prospective online courses will contribute to the ongoing efforts to save cultural resources in need of help.

The overall response was that 23 out of the 34 beginning the survey completed the pre-course surveys via Survey Monkey. There are only 33% attempting to complete any of the surveys during the test year. Respondents revealed which home state they came from five times out of 23. The average response to the pre-course survey is in Appendix E. There is a 68% completion rate once starting the survey. The survey fits an educational category and has ten questions. The last one tabulated was completed on January 30, 2020, before the dissertation's one-year pilot test was over. Besides answering the ten questions, there was an opportunity for sharing comments. These are tabulated in Appendix E.

In the first year, there were seventeen students enrolled, and their home states were designated below. There were fifteen new enrollees in the second year and two re-enrolled, bringing the study period totaling thirty-two active participants for various lengths of time in the first two years.

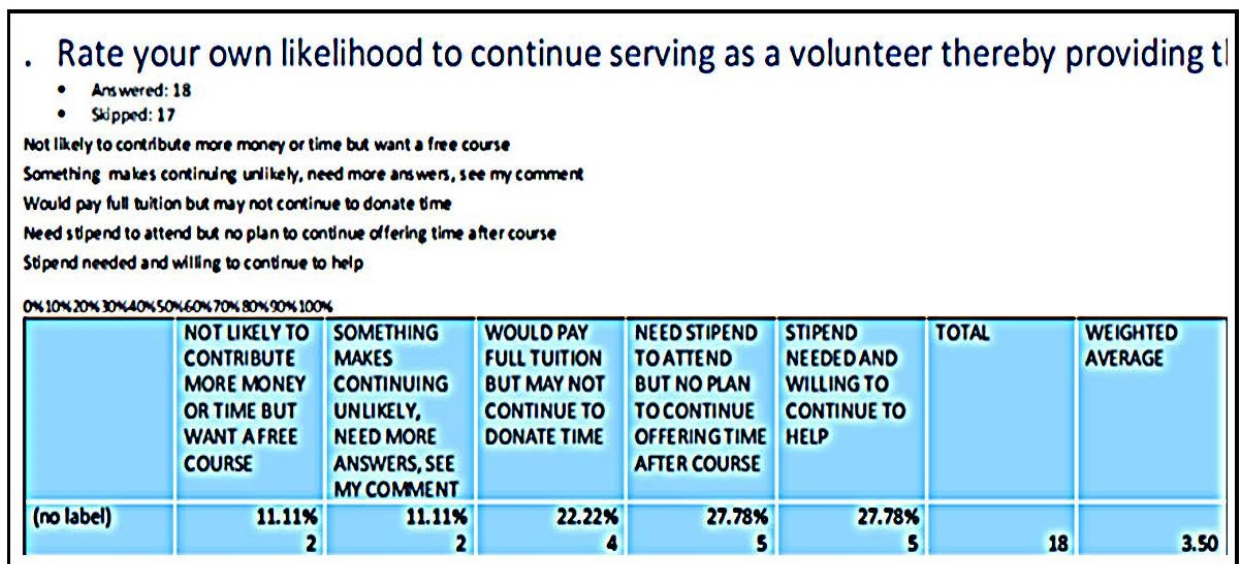


Figure 42. Pre-Course Survey Sample

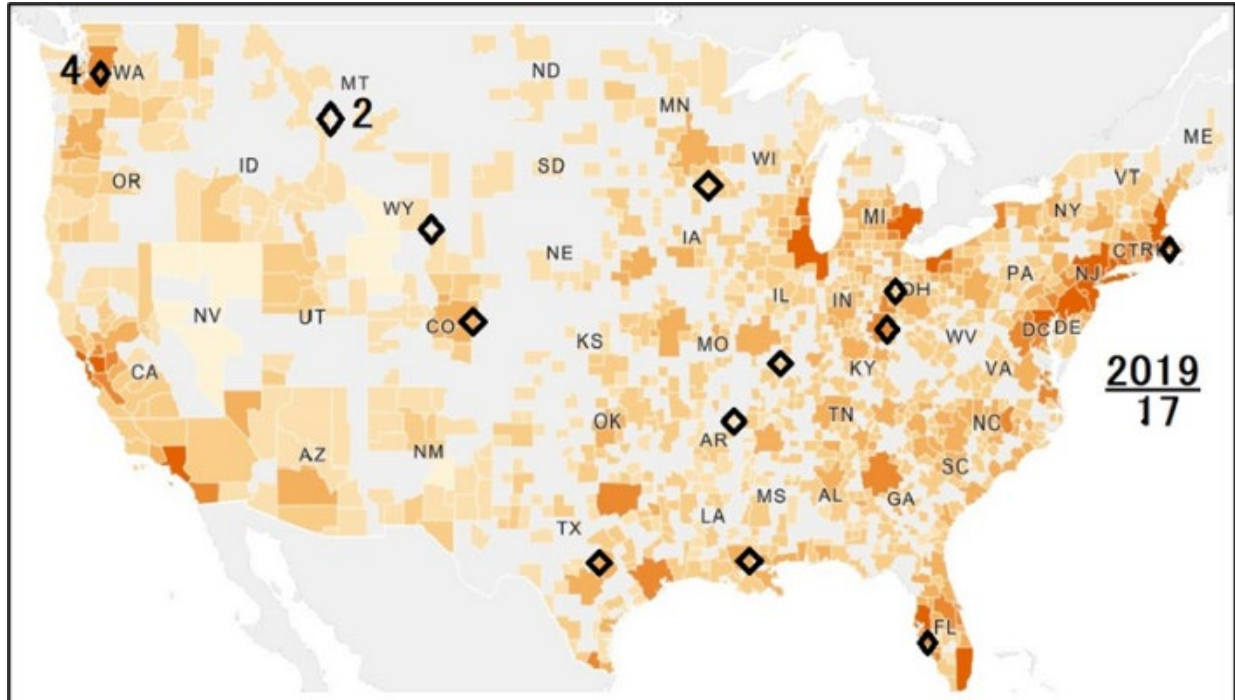


Figure 43. Map of the Enrollee's Home States in First Year of Learning Places

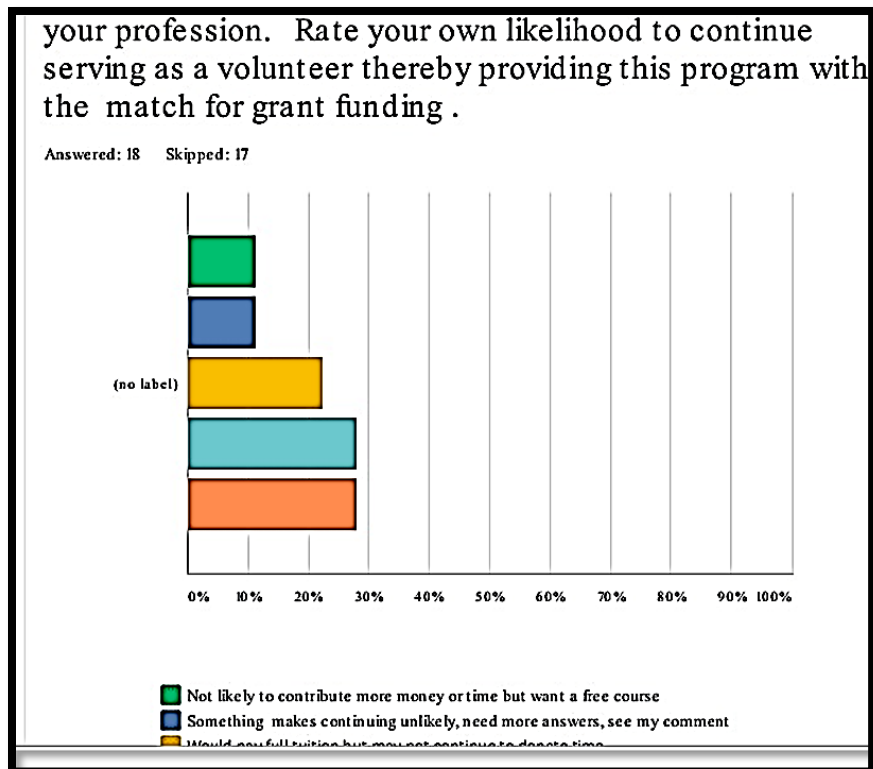


Figure 44. Survey Monkey Version of Pre-Course Survey

Table 19. Cohort Census

COHORTS	YEAR	ENROLLMENT
ONE	2019	3
TWO	2019	3
THREE	2019	5
FOUR	2019	7
FIVE	2020	7
SIX (5B)	2020	7
		32

Table 20. Responses re: HTC and HP Attitudes and Awareness During Interviews

Responses re: HTC and HP Attitudes and Awareness During Interviews				
#	Building Type or Property User	Pros	Cons	Comments
1a	Commercial bldg. and retail merchant	1		Arch: Did get it a tax abatement, but not HTC.
1b	Same building new property owner		1	Wanted his tax credits?"
2	Residential rental rehab owner/contractor s:		1	Owens one of the oldest homes in town
3	Mid-Century Architecture excellence	1		NR potential delighted the ninety + yrs. old architect,
4	Same Mid-Century Architecture home		1	Unimpressed new owners' thoughts re: scrape it away start over.
5a	B & B owner, Brewery Historic District	1		Wanted NHL designation not just NR district
5b	Upscale Residence in Brewery District		1	Demolished and sold
5c	Commercial landlord Brewery District	1		Applying for Grants
6	Rehab historic movie theater on Main Street for new performance venue		1	Never knew about HTC & wanted it after the fact.
Responses re: HTC and HP Attitudes and Awareness During Interviews				
#	Building Type or Property User	Pros	Cons	Comments
7a	Adaptive use of 1941 armory landmark as a new fitness center		1	Architect advised cannot do it's too cut up inside
7b	Adaptive use of 1941 armory as hotel	1		Retained façade only
8a	Agricultural legacy landowners	1		Cons. Easement;
8b	Agricultural Structure survey	1		Tours & HABS surveys.
9	Affordable housing nonprofit in adaptive use of old schoolhouses	1		Layers tax credits, HTC, LIHTC, NMTC

Table 20 Continued

10a	African American historic home preserved and may be an art school	1		Nominated NR list
10b	African American historic home builder		1	Demolished in NCOD
11	Original mid-century architecture Medical Center in downtown location		1	Despite history and NCOD to be razed.
12	Adaptive Use for abandoned RR Depot		1	No developer
13	Mid-Century suburban subdivision	1		Nomination as District
14	Accessory Dwelling Unit in Hist. Dist.		1	No HTC; no income.
15	Historic Steel Through Truss Bridges 4		1	No preservation \$; raze.
16	125 th Anniversary Campus / Land Grant	1		Nominated Historic District
17	Mansion Restoration for Public Park	1		SAT Grants / lobbying
18	New Library Reuse Former Depot site		1	Demolished Depot
	Summary Total	12	12	

For cohort members, the week-to-week activity page views the LMS records the activity for enrolled students. Average page visits per week were 187 during this high participation period. Other average rates derived from the table include the number of participants with content resources such as quizzes, midterm, and discussion posts at 6 per week. Note that the number of pages drops off in the latter part of the study period, and participation becomes nonexistent by the last few weeks. Perhaps a pattern can be inferred by the high values at the beginning of a cohort and again at the end of six weeks. However, several service learners needed much more than six weeks when working at their own pace. Thus, the expected highs and lows are marked to discern if a pattern exists.

Year One After Launch
Cohort One: March 17, 2019
Development avg. 639pg /28

Cohort Two; June 16, 2019
Weeks 3-7 avg. 373pg /10

Cohort Three: September 1, 2019
Weeks 7-15 avg. 165pg /5

Cohort Four: October 27, 2019
Weeks 15-21 avg. 98pg /2
2019 Survey: Dec.24, 2019
avg. 10%

Cohort Five: Jan. 1, 2020
Weeks 21-27 avg. 71pg /3

Cohort Six: February 12, 2020
Weeks 27-32 avg. 47pg/2

Table 21. Weekly Page Count by Service Learners in First Year.

Week	Pages	Part.
17	103	0
18	99	0
19	95	1
20	94	11
21	92	1
22	88	4
23	76	1
24	69	1
25	67	2
26	66	8
27	58	3
28	57	7
29	55	2
30	44	0
31	42	0
32	38	0
32	1143	41
204 participation		
6/wk.		

A pattern emerges on the first week of each cohort when the highest number of pages are read, and most syllabus resources participation occurs. The numbers decrease each week after

that, and there is a reduced average number of pages per cohort. The recorded number of each cohorts' participation observations appears to be more random. Excluding my development period in the first cohort, the observations averaged four per week of a six-person cohort. There is a noticeable increase in observed participation in the last week of the term for three out of five cohorts. That increase could be explained by learners turning in assignments as I posted reminders.

Although planned for six weeks, or one module per week, the enrolled learners asked for more time and were all told that there was no limit to the amount of time and all they had to do was ask to re-enroll in the subsequent cohort. If there were more enrollments in the middle of a cohort, another cohort would be formed, or the end of the term would be extended to allow the later arrivals to complete all modules.

When service learners lagged behind the rest of the cohort---to the point of appearing to have withdrawn they were suspended, thus making room for others to join the cohort. When there were two or more new enrollments on a waiting list, I would start a new six-person cohort after week eight of the previous cohort. Tracking all enrollments and activations is the mechanical part of Canvas' LMS that does require the instructor to intercede. In most other ways, Canvas is an automated recordkeeper of participation levels, page views, time spent online. Its analytics can tally and sort the most visited pages, highest grades, and time duration.

As expected, the one most visited of course resources logging the most views is the "Home Page" and any other navigation aid webpage. The course module directory was the next most used for navigating within the course, with little content. Likewise, the third-highest page count was the pyramid icon displaying the six modules and syllabus acronym, IDEALS.

Table 22. Students Page Views Chart

Resource	Students	Page Views	Participations
Course Home	29	810	0
Course Modules	10	597	0
pyramid_3d.png	28	498	0
Course People	3	326	0
INTRO-1.jpg	5	189	0
Course Files	4	170	0
Course Assignments	6	169	0
Week Six Alternative Final Assignment	1	113	38
INTRO.jpg	3	110	0
main street bozeman.png	1	102	0
Midterm Assessment	2	90	40
Discussion for Cultural Landscape	3	84	0
Course Discussions	5	84	3
Course Quizzes	6	81	0
Course Pages	1	81	10
Course Syllabus	11	78	0
Optional Assignment: Cultural Landscapes	2	77	0
Speed Grader	1	68	0
portal.jpg	5	68	0
FIRST TIME Enrollee CREATE A PROFILE	15	68	0
Course Grades	5	65	0
Course Announcements	9	65	0
Please Download Ten Ways Matrix	1	58	0
Discussion for Week Two:	2	51	1
Week One Discussion: I is for Identify	3	51	4
montage.jpg	2	48	0
New Analytics	1	44	0
Cultural Landscapes Optional Extra Credit	2	40	5
Course Outcomes	3	39	0
SUSTAINABLE crm chapter.pdf	1	35	0
Final Report Expectations	1	35	12

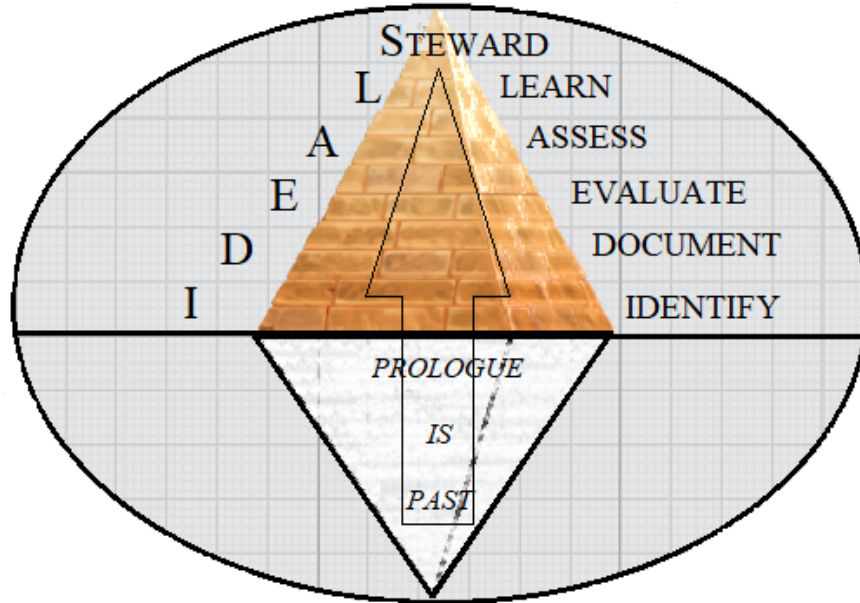


Figure 45. IDEALS ICON as a Stepwise Syllabus Reads from Bottom to Top

The NR form for MSU historic district nomination received the most highly rated index cumulatively for one student who authored a nomination for her project's chosen cultural resource. The pyramid image page was the third most visited, and it served as a landmark when surfing around the course resources. Using these observations of use patterns could be examined for the information that one might glean using REAP. Although REAP is frequently used to observe users of public spaces, parks for patterns of behavior and interaction by public land managers, its use in a virtual space showed promise for my research to improve the course appearance and utility for the users' experience.

Table 23. Most Observed Participation Pages

Number of Students	Page View Number	Content
29	810	Course Home
28	498	Pyramid 3d
15	68	First Time enrollees
11	26	Consent Form

A more granular tabulation would help to see where each enrolled service learner spent their time online. The Canvas analytics automatically records the number of minutes spent online, and the number of pages visited. The Canvas platform can report on these observations weekly so that a timeline could be studied for patterns. See below for a one-week ++ view. While in the course, the learners can access the embedded videos, readings, and built-in quizzes and assignments designed uniquely for Learning Places based on the content provided. These can take longer per page to view.

Canvas also tracks these assessment benchmarks to show what progress the learner is making as they build their knowledge in the stepwise syllabus known as IDEALS Scaffolding; the knowledge can improve competency with the precepts and doctrinal requirements of historic preservation (the Secretary of Interior Standards).

For instance, each module had an opening page matrix showing the appropriate standard from the ten promulgated by the Secretary of the Interior. In this way, the learner can learn a standard per module and build their competency. Then, they are quizzed on their application of the standards in varied circumstances. The rubrics for the questions are applied to provide a grade to demonstrate successful completion of the module.

Table 24. Fifteen Enrollees Page Views

	Page Views	Part.
me	5473	192
1	359	15
2	140	None
3	71	None
4	59	None
5	28	None
6	27	1
7	21	None
8	15	None
9	13	None
10	11	None
11	10	None
12	9	None
13	8	None
14	7	None
15	7	None
	785	16

At different points in the six-module course, they showed more interest, adding to the count of observations of their participation. Table 24 displays the highest page views in descending order per learner. My numbers are excluded. The larger the ID number, the later the enrollment in the course.

Samples of individual performance while in the course can measure the growth in competency, and there are tables and charts in the Appendix used to measure that critical aspect of the dissertation's objectives. The foremost concern is knowing whether an individual has had an overall growth in their KAB, with knowledge being paramount for certifying a graduate.

Working on preservation projects and relevant higher education add together to give a metric used to meet the Secretary of Interior Standards for professional qualifications. Taking the

course seriously and working with a community group can add to an individual's work experience to meet the years of practical work in the field. Quiz and final report completion measure the knowledge gained, and LUs are awarded up to six per year based on that accomplishment. In addition, six hours of readings and passing an appropriate test of knowledge are the assessment used to grant a certificate to the learner and could be proof needed for an audit by state licensure officials.

Of course, a project volunteer could put in as many hours as they can afford to help save their cultural resource choice. The six modules can take six weeks, and some have taken the extra credit modules to amount to nine weeks of volunteer study as a volunteer on a preservation project. Each time a volunteer enrolls can amount to another two months of work experience toward the two years required by some SOI Standards beyond a college degree in an appropriate professional field. Another measure of attitude and behavior is important to gauge if the online course builds a more active preservationist as they progress through the course and practical experiences with the community partners saving a cultural resource.

Annually, an exit survey is sent to former cohort members to contribute to the ongoing efforts for improving Learning Places as their go-to online experience for preservation education. The measures of the changes between the pre-course and post-course survey responses by individual service learners come from comparisons that look for K, A, and B growth indicators. The exit survey, see Figure 46, was sent to all 30-plus first testers of the online course and the first edition D2L version. The response rate for the nearly fifty invitations to complete a Microsoft-based survey was low at 10%. The questions are a combination of formative and

summative evaluations to help gauge participants' changes and whatever improvements are called for as needed revisions in the next version of the online course.

1. Was Historic Preservation continuing education a good fit for you?
1. Preservation was not my interest or 3. Absolutely, I am a preservationist.
2. Were you interested in continuing education credits?
Continuing education is required annually to maintain license or professional knowledge, skills?
Choose: 1. Continuing ed credits aren't needed. ---3. Continuing education needed for license and/or AIA membership
3. Reasons for exit from course prematurely could be due to its time demands. What length of course is preferable?
Time requirements of Learning Places was expected to be 1-3 hours per week for six weeks with optional extra credit in subsequent weeks if desired.
Choose: one week to 6 weeks or more for extra HSW credits.
4. Did you have a cultural resource in mind to help save by taking the online course Learning Places?
The service-learning model for Learning Places matches community with enrolled volunteers. 1. Need an assigned cultural resource? 3. Had a cultural resource in mind.
How many online courses have you taken before Learning Places?
5. Online learning can be daunting for some who have had little or no prior experience with it. Choice: Never tried online before or Choose from the number 2-3 prior courses or more
6. Would you like to see historic preservation courses continue to be offered online?
Historic Preservation courses for continuing education are rarely found online.
Not concerned at all --Need to see more HP online courses
7. Select which one of the six modules held more promise to be of most interest or helpfulness for your continuing education needs?
Each module of the course was a building block to the full syllabus, I.D.E.A.L.S. Please choose 1 for first module week Identify, 2 for Document, 3 for Evaluate, 4 for Assess, 5 for Learn then Lead, 6 Stewardship:
8. Rate your opinion of how Learning Places, the online course, could help in your continued preservation actions?
9. If you completed the course and/or re-enrolled, then going forward, you're likely to know more, advocate more and volunteer more to help save cultural resources.
No change not interested ---Learning Places makes a difference.

Figure 46. Exit Survey

Table 25. Post Course Survey

Post-Course Survey Questions 1-9 and Results		Respondents					
#	Respondents Answers and Average Response.	Answers	1	2	3	4	5
1	Good fit for you: {yes, and I am a preservationist}	{80%= yes}	3	3	3	2	3
2	Continuing Education credits for licensing	{40% yes}	3	3	1	1	1
3	Preferred length course to be 1 to 6 wks.	{avg= 3.8w}	6	4	1	3	5
4	Respondents have a cultural resource in mind. No=1 Yes=3	{3yes 2 no}	3	3	3	1	1
5	Number of online courses taken before Learning Places. None =1; one = 2; >one=3;	{80%=None}	3	1	1	1	1
6	Want HP courses to continue online? 1= unconcerned; 3= more HP online courses;	{80%= yes}	3	3	2	3	3
7	Which one of the six modules held more promise? Stewardship Module=6	{20% = 6}	6	4	6	1	an
8	Learning Places, the online course, helps HP continued preservation actions?	{80% Agree}	3	3	1	3	3
9	Do you know, advocate and volunteer more? 1=None; 2=n.a; 3 = Learning Places makes a difference	{ }					
10	Overall Rating 1-5; Average score 3.8	Stars 1=5; 1=4	5	4	1	4	5
11a	Respondent One: First survey response ever	X					
11b	"I personally had the greatest difficulty with assembling the website. This was due to the fact: ... that I had never done something like that before, ...not in any way related to the content which I populated it with." "Digging deeper into the 'whys" and elaborating on the intent of what is written in the Nomination form is very helpful. most helpful is learning to look at things from another's point of view."2		X				
11c	"As I continue in the course, I look forward to updating my knowledge with it. It has been almost 40 years since I completed a nomination form, so this access is much appreciated."						X

After the first year of running the course, the other exit survey call for projects or preservation activity went out to hundreds of architects working in the Montana vicinity and received one response, as displayed below, for Romney Hall.

At each year's end, the respondents are asked to contribute a one-page progress brief of their activity in a preservation project or the firms they would like to share for the community of learners' benefit. Future cohorts could look to these cases as exemplars for inspiration for their continuing with Learning Places as their choice of an online education source going forward. Appendix E has the case-in-point exemplars shared for the edification of future learners. In addition, these project efforts serve as a template for the similar building type preservation efforts undertaken by service learners in their work. For instance, an adaptive use example for a historic gymnasium:

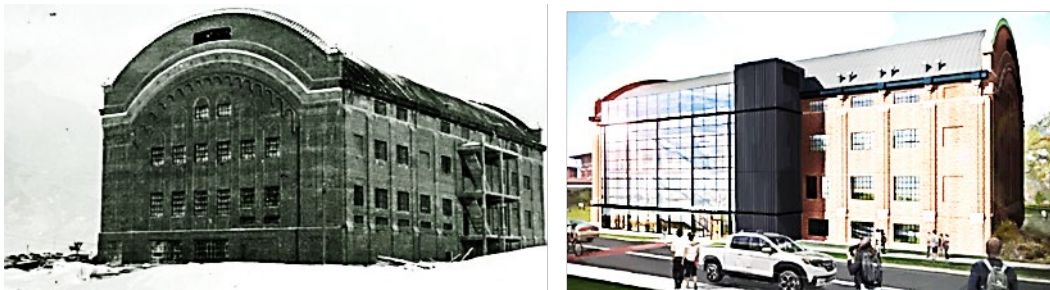


Figure 47. Renderings of Romney Hall Montana State University Before and After Rehab

The example above would be very familiar to Montana State School of Architecture alumni who would take from this case the prospects for adaptive use of Romney Hall for new multi-purposes, updating accessibility, and life safety enhancements. Cushing Terrell's project, the A&E firm chosen for the rehab, is one of many on the national register listed historic campus. The architects offered this contribution of their private practice work so that the

architects in the course's future cohorts can be inspired to become the founders of an archive of preservation activity. In addition, the effort to help their partners in the community makes for good public relations for their business interests going forward.

Finally, a report on the final results of a high-scoring service learner's work in the first year of the course is a Canvas LMS automated analytics service for the instructor. Besides completing the courses' first graduating cohort for 2019, with excellent grades, and facilitating the newcomers to the Canvas navigation issues in the Learning Places course, the volunteer for a nonprofit posted a new website for the community to use. These grades and observations display persistence despite having to admit great difficulty setting up a website for the first time to benefit the chosen cultural resource project.

Table 26. Enrollee's Grades Indicating an A Grade

NAME	DUE	STATUS	SCORE	OUT OF	
Week One: I Is for Identify / Inventory: Discussion Assignments	Nov 15, 2019 by 11:59pm		10	10	  
Pre-Course Survey Assignments	Nov 16, 2019 by 11:59pm		✓	0	 
REQUIRED CONSENT FORM IS A PREREQUISITE Assignments	Nov 16, 2019 by 11:59pm		0	0	
NR Assignments	Jan 15 by 11:59pm		10	10	  
Midterm Assessment Assignments	Jan 18 by 11:59pm		17	17	
Week Four Assessment Quiz Assignments	Jan 25 by 11:59pm		10	10	
Week Six Alternative Final Assignment Assignments	Feb 8 by 11:59pm	MISSING	-	25	
Week Five Quiz: Learning then Leading Assignments	Mar 31 by 11:59pm		15	15	 
Optional Extra Credit with HPEF an AIA provider Extra Credit Assignments	Apr 5 by 11:59pm		-	6	
Optional Assignment: Cultural Landscapes Extra Credit Assignments	Apr 12 by 11:59pm		-	6	
FINAL REPORT SUBMISSION Assignments			-	25	

Table 27. Online Service Learners' Output on Canvas LMS

Submission Type	# Assignments	# Submissions
All Assignments	10	14
File Upload	4	3
Text Entry	6	6
Website URL	4	0
Quiz	4	5

Table 27 above lists the number of assignment uploads, text entries, and quizzes that are part of the online course. There have been submissions for each quiz, textual entries, and assignment submittals. However, the discussion has lagged, and a student commented about the lack of module posts from other students. I asked for a volunteer to facilitate the entry-level students becoming more comfortable, making a big difference for one new enrollee who never used an online course before.

For cohort members, the week-to-week activity page views the LMS records the activity for enrolled students. The average page visits per week were 187 during this high participation period. Other average rates derived from the table include the number of participants with content resources such as quizzes, midterm, and discussion posts at six per week. Note that the number of pages drops off in the latter part of the study period, and participation becomes nonexistent by the last few weeks. Perhaps a pattern can be inferred by the high values at the beginning of a cohort, then again at the end of its six weeks. However, several service learners needed much more than six weeks when working at their own pace. Thus, the expected highs and lows are marked to discern if a pattern exists.

Attitudinal Changes: The participants show measurable growth in their acquisition of new competencies while online. The facilitator can track those attributes while observing the

outputs and results tabulated and discussed in this Part II of Chapter Five. The service learner who completes the online course demonstrates their recent growth with outputs scored using the course rubrics. Tables are included here, and in Appendix E. Their final evaluation measured service learners' achievements, including these core elements that will enable more growth over time:

- Understand the role and content of the Ten Secretary of the Interior's Standards for Rehabilitation so they can apply them to a proposal to help save a cultural resource
- Know the steps for determining the recognition of their chosen historic property and the nomination process for the National Register of Historic Places.
- Become conversant with the instructions for the tax incentive program. Continuing education enables scaffolding the previous two competencies assuring steps can be in proper sequence for tax credits or grants in aid from the Historic Preservation Fund.
- Present the alternatives and help select preferred proposals appropriate to the project's long-term compliance and follow a treatment philosophy concurred by the SHPO and approved by community owners.

To put it most simply, the course modules' guidance to follow the prime directive of CRM is similar to the physicians' admonition regarding their patients, by Hippocrates, "do no harm." With their training, they learn to avoid adverse effects, minimize impacts, and design mitigation when no other alternative is feasible.

The second research question covers the intersection of online and real-world work that can change learners' attitudes as they transfer learning through participants to the community. Recognition of attitudinal changes as factors that may help or hinder a new life choice of

advocacy with other preservationists can emerge from a look at many variables. The following explanation for the glossary of terms can help understand these arcane terms before discussing their influence or metrics if available. Table 28 below matches the keywords of bulleted problem areas by using an index of positive and negative responses and is summarized from the field notes using REAP.

Keywords for gauging the changes in the attitudes of those constructing their learning:

- Resistance: expectation vs. actual users of health benefit, tax credit, masks vacs.
- Rugged individualism: federal dependency vs. mythical individualistic survivalist.
- Competitiveness vs. cooperative approaches: neoliberalism vs. cooperator owners.
- Authority vs. agency: doctrinal compliance vs. creative prerogatives; participatory
- Market-driven values vs. voluntarism: price dictates vs. community values.
- Digital/ techno-savvy vs. analog techno challenged on a TPACK spectrum.
- Digital humanities vs. Anti-digital humanities traditionalists for print vs. bytes.
- Power users vs. bouncers who leave no trace for metrics to analyze.
- Architect disconnect reinforced by educational institutions vs. open MOOCs
- Diffusion and contagion: Keeping up with Jones, copycat, for federal largesse.

Table 28. Attitude Change Factors Influencing More Preservation Activity

Attitude Change Factors Influencing More Preservation Activity					
	<i>Positive</i>	<i>Negative</i>		<i>Positive</i>	<i>Negative</i>
1	Misplace Loyalty despite mixed messaging	Policy thrusts need demonstrations	6	Techno digital overcomes exclusion of remoteness	Haptic technical skills developed for documentation and heritage confidentiality
2	Not enough to go round is a zero-sum outlook on life.	Anti-community	7	An online virtual community of learners and publish e-docs	Heritage ways are private, and traditional paper prints can be controlled and copyrighted
3	Boosts Globalism	Employee owners bootstrapping	8	Complete basics before enrolling and goes for extras	Enroll for a peek and bounce without feedback
4	Conformity of law and order is predictable	Artistic license for ego gratification and participatory	9	Decades of disconnect documented causing pushback	Changing the culture from within while prosperity surges is an institutional challenge
5	Short-term gains for bottom liners	Displaces human ecosystems for the sake of progress	10	More demand than supply by early adopters	Without prior examples, fiscal conservatism prevails vs. chance.

Regarding the attitudinal changes, some forces or tendencies influence these factors; see Record of Narratives from interviews.

Attitudes and attitudinal change are more likely to be revealed in print, periodicals, journals, annual government reports of highlights, interviews, and multi-channel electronic posts. See Appendix E for a table of pros and cons regarding attitudes. If this indicates that the equal number of pro and con responses from a sample size of two dozen local interviewees could be extrapolated throughout my thousands of observations, it probably will not remain a fifty-fifty split.

One of the online course outcomes for service learners was the change in attitudes about joining local preservation efforts already underway by concerned community members.

Furthermore, by making gains with the online course's content and knowledge competency, especially if the service learners re-enroll, there could be the long-sought-after pinnacle of any planned project: its implementation. For the online course service learners, stewardship is the penultimate phase that advances the project, with their research, towards sustainable architectural rehabilitation plans and specifications. Continued maintenance schedules for preventative care of the cultural resources will benefit ongoing resiliency, building a more caring and self-sufficient rural community through cooperation, not competition.

Stewardship was presented as the final module in the six-step syllabus of IDEALS for many good reasons. This sixth step leads to the commencement of long-term maintenance plans where preventative care helps prevent another substantial rehab project going forward. The service-learner who adopts a cherished cultural resource and learns the SOI standards proficiently will have achieved the needed competency factor of gained knowledge.

Having more confidence about the knowledge gains enables the participant to shift their personal and professional practices. Thus, the steward will make the community's dreams a reality through changes in their behavior by leading others to multiply their impact.

The three traits, knowledge, attitude, and behavior measures occur at different Learning Places project analysis phases. The three quantification measures occurred when the knowledge gained is tested via the online course assessments; the attitude changes are qualitatively read in the stated preference responses in the personal surveys before, during, and after their online

course participation. The behavioral difference is evident in how the participants apply this growth as they proceed in their careers after course completion.

The interpretation of the data in Part II provided insights into how much the learners' changed in acquiring competency. The online course's first-year reports measure the participants' output and the intervention's role in changing attitudes. In addition, categorical data collected about the participants' Knowledge, Attitude, and Behavior, while online, address quantifiable competency gains. As a result, the participants who finished the course's step-by-step modules and provided a final report received a Certificate of Completion. The findings presented in Part II suggest that an online tool can, with some limitations, lead to the knowledge necessary and attitudes that support greater utilization of existing historic preservation tools.

Part III. Results for Methods Three and Four

The third part of Chapter Five's Results and Findings covers two more forms of evaluation and assessments. The first entails REAP and present the results. The fourth is the CC findings derived from those methods described in Chapter Four.

Part III.1. Methods REAP and CC Results

Not having a context to place the intervention into for the sake of measuring its efficacy in the existing field of historic preservation spurred me to apply the last two methods of REAP, to observe those activities in the real world and constant comparisons of the past behaviors through official records. Knowing there are many ways to preserve cultural resources besides the treatment of extant historic structures could make this inquiry much broader and unwieldy. Focusing on practitioners' ways of preserving historic properties allows me to make observations

and conduct interviews with key informants using REAP helps narrow the research. Looking back at twenty years of past preservation work of the communities allowed for an ordinal ranking of how active they have been before Learning Places’s launch in 2019–20. Perhaps insights, if not theories, will emerge from constant comparisons of the activity while using the known factors that differentiate the level of professional and community advocacy. To enable ease of grasping the many acronyms found in this Part III.1a and b., the Glossary helps understand the abbreviations presented in the various tables throughout the remainder of Chapters Five and Six.

Table 29. Glossary

<u>Glossary</u>			
Pop.	State Population 2020	Change	Change in State Population
CLG	Certified Local Government office	HABS	Historic Am. Building Surveys
CLG/Cap	Number CLG per capita	HPF	Historic Preservation Fund
HTC	Historic Tax Credit projects 5 yrs.	TRAIL	National historic trail systems
Grants	HPF grants by federal sources \$	SAT	Save America’s Treasures
NR	National Register listings total	Total/RANK	Sum of all factors and ranking
NHL	National Historic Landmarks	POP.	Total state population ranking
Permits	Building activity reported	Colleges	Offering HP programs
HP	Historic Preservation	WHS	World Heritage Sites

This chapter’s tabulations of data that follows are a select compilation of many factors that reflect how much preservation activity has been occurring in the eight states of the study area. It is used for several comparisons to find patterns that may lend confidence to any of the conjectural theories as to why Montana or any of the sparsely populated rural Western states are lagging behind the rest of the United States when it comes to utilizing the HTCs.

Part III.1.a Rapid Ethnographic Assessment Results. A tabulation of the results from using REAP in my research is found at the end of this Part. The sample in Chapter Four has been filled in and expanded for the results and findings. REAP helps trace the diverse past preservation activity. By scrutinizing over the long term and trying to minimize bias, one can look for trends and insights coming out of the research. For example, those federally led preservation grantmaking programs changed with each administration coming to DC according to the new agenda they initiate.

In 2014, the Obama administration's Secretary of the Interior Sally Jewell announced the new grants for underrepresented entities and said,

Our American heritage is a tapestry made up of threads from many nations and communities, and we are working with public and private partners to help ensure that our National Register of Historic Places reflects this remarkable diversity. These matching grants will enable us to add important sites that have not yet been recognized and more fully tell the story of our country.²⁶⁰

²⁶⁰ Sally Jewell, Former Secretary of Interior, (News From the NPS, 2014), <https://www.nps.gov/articles/upload/News-Release-Underrepresented-Communities-Grants-2014.pdf>.

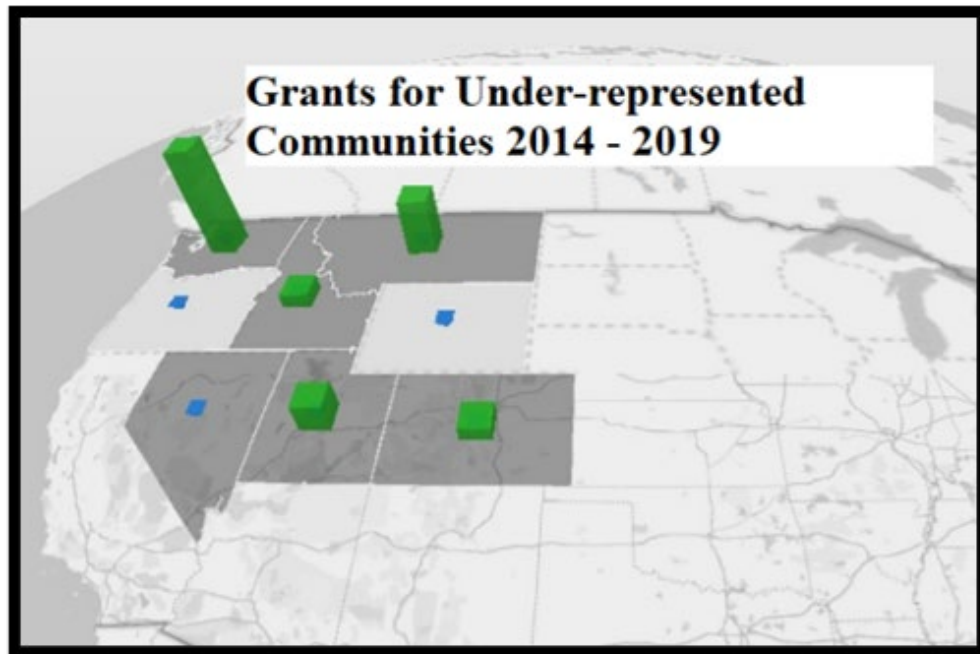


Figure 48. Study Area Map of Grants for Underrepresented Communities

Like so many administrations before Obama, each one creates a new way to effect positive change under the umbrella known as cultural resource preservation. Reagan emphasized the bicentennial celebrations and the restoration of the Statue of Liberty. Clinton and Bush pushed forward Save Americas Treasures for all communities to compete for limited funds. Obama moved funds from SAT to underrepresented communities, and Trump spread those dollars out to any rural area community; Biden has reversed some of the adverse effects on the HP programs and pushed an enormous infrastructure bill that includes HP funding.

Community competition is a way of building solidarity, and the byproduct of whether funding by grants is received is more deficiency awareness by those members of civil society. As the third sector, civil society can work with or against measures from the government or the private sector of commerce. Civil society comprises nonprofits, guilds, associations, churches, labor unions, humanities, and library supporters. Without a strong, aware, and active civil

society, the many livable cities would not have become amenity-rich or viable against both natural and cultural upheavals.

While the government can provide security and infrastructural improvements that no one person or city can do, it does not fulfill the diverse needs of a pluralistic society of any multicultural population. Commercial sectors pay attention to civil society preferences, and somehow between life and art, there emerges a symbiotic relationship of providers and consumers. Many livable communities have a long history of ancestral giving that has changed the built environment for cultural, social, and educational progressive improvements. The genius loci of memorable parts of the city or countryside are somehow the result of partnerships between all three sectors of society, and it is civil society that continues to make use and provides care to retain the sense of place. I spoke to many key informants who provide services from all three sectors of society to triangulate the findings from my previous research with others' points of view to help answer RQ2 regarding the lag in using the HTC federal programs.

Each of the interviewed key informants and experts in the preservation field offered their conjectural hypotheses for the lag in their states' utilization of the federal preservation programs. I felt there needed to be some testing to see if any more popular advice could prove to be a valuable indicator to help answer the dissertation's research questions. The NPS and its affiliate Rutgers University report on the utilization of the HTC annually.²⁶¹ The summation of the program's forty-two-year history is presented in five-year cumulative tables annually, along with economic advantages to continuing the HTC program and some case studies.

²⁶¹ Federal Historic Rehabilitation Tax Credits. NPS TPS, n.d.

One SHPO remarked that knowing why owners do not complete the process to receive the HTC is a matter for accountants. He is not trained to analyze their business decisions and opportunity costs. Instead, he checks for compliance with the Secretary of the Interior's Standards (SOI Stds.) and certifies approval for Part I and II.

I did ask professionals who train other Certified Public Accountants (CPAs),²⁶² investment hedge fund managers who advise them, and design team professionals, including construction management consultants if they had an idea from the financial viewpoint for lags in utilization. I simply wanted to know if the owners were getting professional advice regarding opportunities to get tax credits for their property rehabbing. There was unanimity in responses from financial consultants that the owners and their real estate development partners either already knew of the tax credits or were informed as part of their office practice. Likewise, amongst insurance brokers, accountants, and construction managers whom I interviewed, there was unanimity in their responses about informing clients regarding tax credits.

Because tax credit applications could add services to the financial consulting side, they offer their knowledge and competency to clients as a value-add that differentiates them from their competition. Unfortunately, the same question posed to architects did not get the same response most of the time. Therefore, the question posed to owners has been tabulated along with those from more or less knowledgeable architects and included in a Table found in Appendix E.

The CPAs offering information and the consultant's ability to help with applications to the HTC does not always sway the argument for taking the incentives. A few owners' have

²⁶² The terminology for the observation of property owners who resist the use of the historic tax credits could be called a lost benefit or cost of lost opportunity as per the response by S. Whitman and Associates, CPA.

voiced their pride in not having a tax burden to offset due to their clever manipulation of expenses and revenues. Others reported to their architects that they did not want to get involved with government programs. Those reluctant to be participants outnumber the 45,000 project owners who did take part in a hundred-billion-dollar tax shelter over the past forty-five years. To estimate, the proportion of those who have chosen to rehab a historic building annually is a trillion-dollar annual segment (6%) of US GDP.

A few billion spent on rehab for the HTC per year versus the greater construction universe gives a disheartening picture: construction has been growing exponentially worldwide, yet historic preservation represents 1 per 1000 dollars to help save cultural resources.²⁶³ Moreover, the proportion of professional architects attending the few preservation pieces of training offered annually by the National Trust, the Association of Preservation Technology, and the Vernacular Architecture Forum is less than one percent of the 95,000 member AIA. The 6,000 plus members of the Historic Resources Committee host a few sessions and a gathering at the annual conference of AIA and deliver their talks to the few loyal and those curious. The order of magnitude difference of how many could be attracted to volunteer for the sake of their hometown cultural resources' preservation is what attracted my attention to want to change the proportion. AIA conferences are where I made repeat observations of the attending architects for my REAP methods.

²⁶³ The average rehab project cost has been tracked by the NPS in their Rutgers University annual reports. The cumulative average for all years in Montana calculated to be \$1.4 million. Prime reuse has been for housing and low-income senior housing is a typical project goal.

Table 30. REAP

The following procedures followed the REAP methods for data gathering of observations and insights from participants to learn more about the actual context for the historic preservation intervention called Learning Places. It also tracks the observations of the users of the online course. According to those who have used Setha Low's Rapid Ethnographic Assessment Procedures, it only takes three types of observations for the researcher to triangulate on their study area. I show a few below and more in Appendix E.				
REAP: RAPID ETHNOGRAPHIC ASSESSMENT PROCEDURES				
<u>METHOD</u>	DATA	PRODUCT	WHAT CAN BE LEARNED	WHAT WAS LEARNED
Individual and Key Informant Interviews	Recorded field notes and tape recordings of conversations, interviews; w/ onsite photos, videotapes are archived. Transcriptions are indexed.	Completed transcriptions of interviews and the pre-interview notes and questions are copied and archived remotely	Patterns of commonly known site characteristics can be verified and compared for agreement or contrasting POV Educational values of shared information. Final reports capture the past interview transcription highlights.	Key informants provide critiques and tips to help revise the online course. Final reports share deeper understanding of their chosen sites via insights, reflections, and images. NR nominations offer comparative cases-in-point.
<u>METHOD</u>	DATA	PRODUCT	WHAT CAN BE LEARNED	WHAT WAS LEARNED
Participant observation	Field notes and video / photographic recordings onsite for historic sites with community informants.	Socio-cultural information for contexts of each chosen cultural resource for local tours, grants, and publication research	Communities share their stories offering contexts for those who want to learn more about their local environment and historic events. In addition, concerns for the future preservation of the historic properties are shared with interested parties, government grantors.	The historic property owners and community invite tour participants to create a communal space. Sharing the past stories and perception of the potential future for more educational actions is weighed by surveying users. Opinions, likes/dislikes inform educational outreach in the locality.

Table 30 Continued

Online participant observation	Online users are tracked by course analytics for quantifiable data—& qualitative data such as narratives, assessment feedback.	Background information on the online learners' chosen sites and the reasons for selecting these NR-listed properties. I.R.B. consent forms are signed beforehand, and service learners offer their prior preparation for online learning.	Service learners research and reveal the significance of the place, then present current concerns in a condition report. They both receive and give feedback with the instructor as a moderator. Their peers in the cohort rotate as moderators. The instructor observes discussion and evaluates when cognitive presence is revealed.	Instructor moderates the service learners and observes and recorded online as they post discussion pieces and explore content by the instructor looking for the moments when cognitive presence is revealed. Cohorts' shared feedback on discussion posts is screened for archival value
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Part III.1.b. Differentiating the Study Area by Constant Comparisons. Enrolled service learners in Learning Places came from five of the eight states in the study area. The three states with no enrollments in the online course also lagged behind the other five in preservation activity indicators shown in Table 31 below. Those three states, Utah, Wyoming, and Nevada, posted the lowest five-year results in the competitive grantmaking program of the Historic Preservation Fund (HPF).²⁶⁴ They were at the bottom of the study area results, and in the case of Utah and Nevada, they received none of the nearly \$100m per year of competitive funding for the

²⁶⁴ Established in 1977, the Historic Preservation Fund (HPF) is the funding source of the preservation awards to the States, Tribes, local governments, and non-profits. Authorized at \$150 million per year, the funding is provided by Outer Continental Shelf oil lease revenues, not tax dollars. The HPF uses revenues of a non-renewable resource to benefit the preservation of other irreplaceable resources.

preceding five years. Every state would be appropriated about a million each from the remainder of the HPF annual funding. With that funding, the states and tribal entities were authorized to review the HTC's from their local communities. An ordinal ranking score could be generated from the datasets I compiled from official reports by observing both the competitiveness for grants and the private sector utilization of tax credits. These observations of the private sector and civil sector participation with federal government programs, meant to be incentives to achieve policy goals, had me looking critically at the past two decades or half the lifetime of the HTC's and related grants programs.

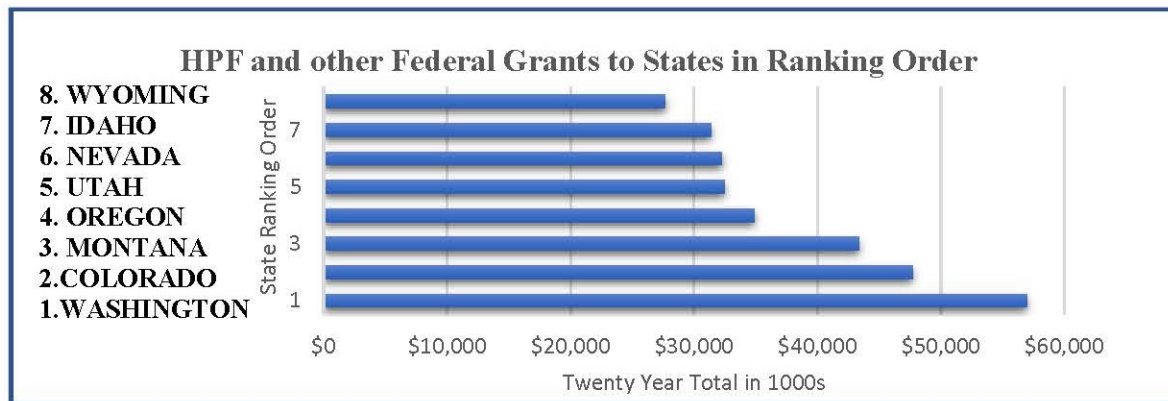
Table 31 displays the spread over twenty years of preservation activity in each of the study area's eight states. In Appendix E, complete datasets indicate an ordinal ranking of the eight states in the study area. I charted this summary of past preservation grants, contained in a unique matrix for the relative preservation activity for the past 20 years. It lists all of the HPF aid to the states and the relative ranking of the eight states in the study area as summarized in the following (dollar amounts are in the thousands):

Table 31. Grants to Eight States in Study Area Past Twenty Years

GRANT PURPOSE	YEAR	WA	CO	MT	OR	UT	NV	ID	WY	STATES	AMT.	TYPE
Total 20 years		\$10,939	\$11,680	\$11,348	\$3,870	\$3,462	\$6,268	\$4,364	\$2,662		\$54,593	
HPF / STATE FOR 20 YRS		\$46,000	\$36,000	\$32,000	\$31,000	\$29,000	\$26,000	\$27,000	\$25,000		\$252,000	
Total 20 years		\$56,939	\$47,680	\$43,348	\$34,870	\$32,462	\$32,268	\$31,364	\$27,662		\$306,593	TOTAL

When ranking the states in the study area, some of the metrics I applied follow in the chart below and in Appendix E.

Table 32. HPF and Other Grants in Ranking Order



From the two tables above, one might prematurely conclude from the limiting factors of the HPF fund and other federal grants a ranking for one of the least populated states, Montana, edging out more populous Oregon, Utah, and Nevada in all manner of preservation activities. That would be a false conclusion, yet it does not diminish the table. Montana does indeed rank as the third most successful in garnering federal support when competing for HPF grants-in-aid and several programs. To answer RQ2 and RQ3 comprehensively, I looked beyond this first table's results and made layers of comparisons. To guide these constant comparisons, I would take key informants' suggested but conjectural theories for answering RQ2 and run comparisons to see what emerged.

Table 33 below displays population ranking, grants obtained, and rehab projects completed with HTC over the past five years.

Table 33. Population vs. HPF Grants and HTC Rehab Ranking for the Past Five Years

Pop. Rank	Grants HPF \$ / #	Rank \$ Grant / HTC	Historic Tax Credits 2016-2020
1	WA \$ 1.2m / 6	1 / 1	WA \$476m / 42
2	CO \$.61m / 4	2 / 3	CO \$91m / 22
3	OR \$.48m / 3	3 / 2	OR \$215m / 33
4	UT \$ 0m / 0	7 / 4	UT \$48m / 24
5	NV \$ 0 / 0	8 / 8	NV \$1m / 1
6	ID \$.21m / 2	6 / 6	ID \$12m / 4
7	MT \$.28m / 2	4 / 5	MT \$14m / 7
8	WY \$.26m / 1	5 / 7	WY \$3m / 3
Total	5 yr.= \$ 3m / 18		5 yr. = \$860m / 136 16% of States but only <3% of USA USA =\$30,883m / 5118

Another premature conclusion for more populated states prevailing over sparse ones is belied by several anomalies, i.e., I lose confidence in this array—see Nevada and Utah. I found out that those experts who theorized that population was the key factor to study its effects on the utilization of the HTCs may have been onto something, but I remained skeptical. So, I developed a comparison between the study area and a random area of eight states.

cultural resources in their midst. The conclusion reached was that the per capita ratio of HTC projects is not a reliable predictor for the number of HTC rehab projects. Instead, I used the extrapolated average number of HTC projects per state as if the total for the United States were spread out per capita. The ‘actual results’ versus the ‘expected number’ was shown to be off by a percent of the difference, and after ranking, the theory that population size governed preservation activities could not be reliably supported.

Preservation activity can be observed in many areas of human behavior, such as the six arrayed in Table 35, where the observations of state-by-state preservation activities’ totals, per category, are summed along each row to arrive at a state quotient. Thus, the composite dataset can be used as a baseline of the state ranking going forward. In addition, a trendline can be drawn for future changes from the base year.

Table 35. State Ranking Based on Multivariate Preservation Activity Quotient

State Ranking Based on Preservation Activity Quotient									
	CLG	HTC	NR	NHL	HABS	TRAIL	Total & RANK	+ / -	POP.
WA	56	45	1557	24	830	0	2512 / 4	-3	1
CO	63	28	1558	25	911	7	2592 / 3	-1	2
OR	54	51	2040	17	525	3	2690 / 1	+2	3
UT	96	25	1841	14	679	4	2659 / 2	+2	4
NV	4	1	382	6	428	4	825 / 8	-3	5
ID	35	5	1041	10	382	2	1501 / 6	-	6
MT	17	16	1181	28	513	1	1770 / 5	+2	7
WY	22	6	560	27	551	4	1188 / 7	+1	8

As it turned out, after arranging in columns the many factors of preservation activity, shown above, with multiple observations, the findings challenge the assertion of the original question: Why does Montana lag in HTC utilization? Can the comparative ranking help explain

why Montana, with a population rank of 7, lags in the one metric of HTC projects but ranks fifth overall in this cumulative quotient measuring other federal preservation program activity?

Another observation can be drawn from this table above regarding population size relating to the number of preservation actions in each state by considering other related factors, such as repeat listings on the National Trust's Eleven Most Endangered List of Historic Places. For instance, though Montana is first in the National Historic Landmark listing, it regrettably also leads to negative reporting for the number of times its landmarks have been placed on the Eleven Most Endangered List.

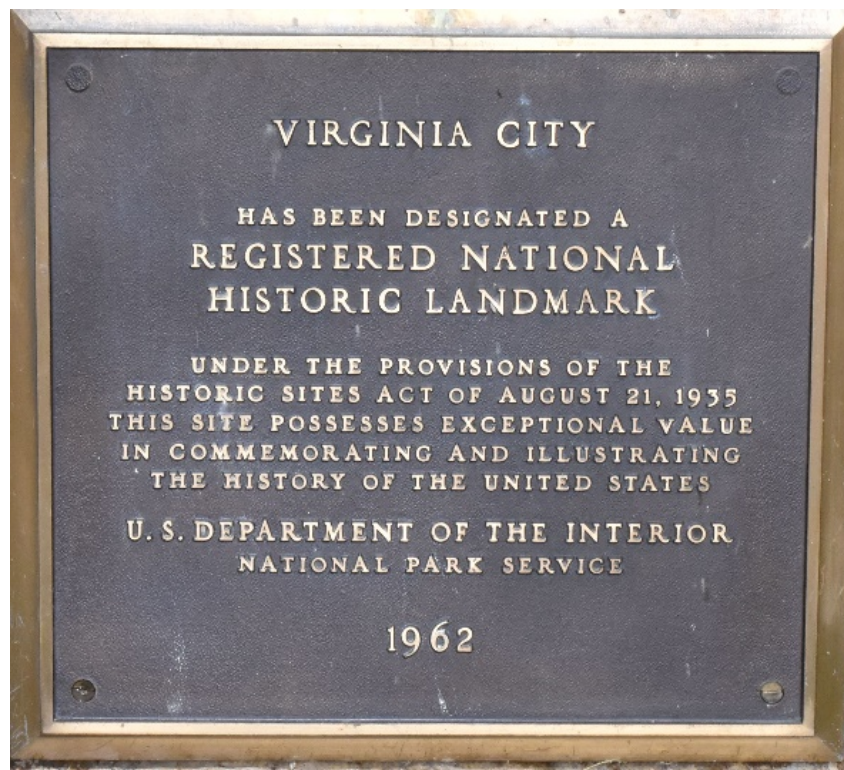


Figure 49. NHL Plaque at Virginia City

Virginia City was designated the highest listing under the original 1935 Historic Sites Act back in 1962 before the passing of the NHPA of 1966. Despite that recognition as a National

Historic Landmark, it would take until the late nineties before the State of Montana would place it under their protection. See Appendix F for the Table listing the NTHP endangered sites in Montana. Virginia City was on that list more than any other site, and it had the highest designation as an NHL. The NPS was asked to include Virginia City as a monument in the NPS system but refused it for numerous reasons influenced mainly by the vast collection of artifacts without sufficient integrity of their provenance. Since then, the NR significance evaluations consider authenticity as important as the term ‘integrity since that was primarily derived from the architectural historic fabric. The NPS rejected Ninety-eight other Montana sites of natural and cultural importance over the years.²⁶⁵

Another example shows that there is not a consistently strong connection between population rank and preservation quotient.

This table lists the HTC program’s three-step application process factors and how many drop out before completion.

Table 36. Ranking States Based on Part One Applications for Tax Credit

Rank	\$	# Appl.	# Completed	% Completed	Rank	Score
1	WA	CO	OR	NV	OR	9
2	OR	OR	WA	WY	WA	9
3	CO	WA	UT	WA	CO	15
4	UT	UT	CO	OR	UT	16
5	MT	MT	MT	UT	MT	21
6	NV	ID	WY	MT	WY	23
7	ID	WY	ID	CO	NV	23
8	WY	NV	NV	ID	ID	28

²⁶⁵ Lary M Dilsaver and William Wyckoff, “Failed National Parks in the Last Best Place,” *Montana the Magazine of Western History*, Autumn 2009, Volume 59, no. 3 (2009): 3–23.

In Table 36 above, there are two ties for first place, Oregon and Washington, and a two-way tie for next to the last place Nevada and Wyoming. More factors will need to be compared to break these ties. One factor that shows an active preservation activity by an aware civil society is the long-running Historic American Building Survey (HABS) and the National Historic Landmarks Register Listings that began with the 1935 Historic Sites Act. Comparing those eight decades of behavior by civil society to the relatively recent nominations to the NR since 1966 yields another factor I called a gap. The gap is between the number of listed sites and properties and the number of documentation projects submitted to the NPS and ultimately archived with the Library of Congress.

Table 37. The Gap between National Register Listings and the Documentation for HABS per Study Area State

	<u>WA</u>	<u>OR</u>	<u>ID</u>	<u>MT</u>	<u>UT</u>	<u>WY</u>	<u>CO</u>	<u>NV</u>
NHL NR	24 1571	17 2040	10 1041	28 1191	16 1841	27 560	28 1583	9 382
HABS	833	533	382	542	679	551	929	428
Gap To Do	-738 46%	-1517 74%	-659 63%	-649 53%	-1162 63%	-9 2%	-654 41%	+46 +12%

Table 37 provided the seventh distinct factor in ranking the eight states in the study area. I ran a runoff comparison using all seven tables worth of factors; the seven factors are listed and cross-reference in the following key, in Figure 50 below.

Key for Tables used in the Overall Ranking Score States' Preservation Activity Ranking

- 1= Table 34 Historic Tax Credits Projects vs. Population Size of the Study Area & Random 8 States
 2= Table 33 Population vs. HPF Grants and HTC Rehab Ranking for the Past Five Years
 3.=Table 33 HTC per state cumulative, total tax credit projects compared to HPF
 4= Table 31 All federal reported preservation grants for 20 Years
 5= Table 35 State Ranking Based on Multivariate Preservation Activity Quotient
 6= Table 36 Ranking States Based on Part One Applications for Tax Credit
 7= Table 38 The Gap between National Register Listings and the Documentation for HABS per State

Figure 50. Key to the Tables Used in Overall Ranking Score in Table 37 Below

Table 38. Overall Ranking Based on Seven Comparisons

Ranked in Pop. Size	1	2	3	4	5	6	7	Sum	Avg,	RANK	Degree Off Pop Rank
WA	5	1	2	1	4	1	4	18	2.57	1	0
CO	6	2	3	2	3	3	3	22	3.14	3	-1
OR	1	3	1	4	1	2	8	20	2.85	2	+1
UT	3	7	4	5	2	4	6	31	4.43	5	-1
NV	8	8	7	6	8	8	1	46	6.57	7	-2
ID	7	6	8	7	6	7	7	48	6.85	8	-2
MT	2	4	5	3	5	6	5	30	4.29	4	+3
WY	4	5	6	8	7	5	2	37	5.28	6	+2

Findings: 25 years of the HTC program found that population size is not governing the amount of HTC attempted, completed, and money spent on rehab projects. Instead, Oregon takes first place over larger populated Washington and Colorado. Likewise, Montana rises above the larger populated states of Nevada and Idaho. The two states behaving as expected are Utah and Wyoming, in fourth place and sixth place, respectively.

The tabulated results for the study area eight states, based on the constant comparison method, yielded a final score shown in Table 37 above for each state. Also, I show the degree that their score is off from the expected ranking predicted by the conjectural population theory

‘that more preservation activity will occur if the number of people is greater in a state’ or in other words, “population size matters.”

The big takeaway is Montana’s ranking in fourth place when its population is ranked seventh, and Nevada places at seventh overall despite being fifth in population size. Wyoming and Oregon were above their population ranking. Three states were only one degree removed from supporting the expectation of their placement in the overall ranks. In states populated with multi-million people, the relationship between expectations and the measured results is substantial, as in Washington, Oregon, and Colorado. However, the anomalous results of five out of eight states reduce confidence. To judge if the finding is also valid for the random selection of eight states from the rest of the United States, see Table 34 for HTC vs. Population. Comparing random states' per capita ratio to HTC projects is not a reliable predictor for HTC rehab projects in those states. Thus the hypothesis that population will govern the number of HTC remains falsifiable and subject to more testing with other socio-economic and political factors. I show more results for other factors in this chapter and Appendix E.

The states’ entries on the National Register and the documentation for HABS per Study Area State comparison in Table 37 that I call the Gap can be carried out further in a pragmatic way. For the prospective volunteers who have not chosen a project to work on for their Learning Places enrollment, I need to suggest a good prospective cultural resource. For example, I might suggest one with the HABS work already done for a property already listed on the NR so the volunteer could get started on a real prospect for eventual application for HTC rehab approval by the NPS. In this way, the volunteer may inspire the property owner to use their final report as a

catalyst toward their application for the HTC program and commission a licensed and qualified architect to help with plans.

The following table shows the gap in building numbers and % of the total NR properties with HABS documentation. Of course, the actual recordation of the NR property may be only partially done, or it was for a structure, like a bridge, that is ineligible for the HTC program, and the same is true if it is a non-income producing building. Generally, the table shows many more NR properties and HABS documented buildings waiting for the volunteers from Learning Places.

Table 39. The Gap between Number of NR/NHL and HABS Reveals Opportunity for More HTC

	<u>WA</u>	<u>OR</u>	<u>ID</u>	<u>MT</u>	<u>UT</u>	<u>WY</u>	<u>CO</u>	<u>NV</u>
NHL NR	24 1571	17 2040	10 1041	28 1191	16 1841	27 560	28 1583	9 382
HABS % Done	833 54%	533 26%	382 37%	542 47%	679 37%	551 98%	929 59%	428 112%
HTC total %	109/261 42%	120/284 42%	13/56 23%	47/146 32%	87/221 39%	16*/44 43%	85/349 24%	2*/13 46%
Oppty.	572	249	326	396	458	507	580	415

Colorado and Washington lead with Utah and Nevada next in opportunities that, when added together, offer 3,503 properties for future volunteers to work on in the Learning Places online course with its community of learners. To what end would this opportunity computation be best directed. In real estate development and city planning, the highest and best use axiom is

paramount, next to the trite one: location, location, and location. There is one area that HTC has been very effective in disrupting, which is the dearth of affordable or low-income housing. The reports show that the HTC when combined with other low-income tax credits, reduces rehab costs.

Currently, there are estimates that four million new housing units are needed in the United States. Unfortunately, despite myriad tax abatements and innovative tax code treatments encouraging low-income housing, there are not enough affordable housing units to go around. Furthermore, the states have waiting lists for those seeking affordable housing; see the table below:

Table 40. Housing Waiting List Per State

<u>Housing</u>	<u>WA</u>	<u>OR</u>	<u>ID</u>	<u>MT</u>	<u>UT</u>	<u>WY</u>	<u>CO</u>	<u>NV</u>
Wait lists	23	14	6	8	9	7	23	7
\$ LIHTC/yr.	\$21m	10m ?	5m	3m	9m	3m	16m	10m
HTC**	\$91m	10m	5m	5m	14m	0	20	0
Sum for housing	\$112m	20m ?	10 m	8m	23m	3m	36m	10m

Since half of all HTC project rehab costs are devoted to housing upgrades or adaptation for residential uses, I am taking liberties by listing last year's projects at fifty percent of the total reported Part III applications. (Fact-checking locations with Google Maps can aid estimation.) Oregon LIHTC funding was not available for the recent year, so it is estimated. Nationwide HTC has been spent as follows: 35% of all HTC was spent on low to moderate housing; subsidized by 'twinning' LIHTC at 21%, and all of HTC is half-spent on housing for all income brackets. This cannot be assumed to be a repetitive average when facing the years after the great recession of

2008. That period saw a decline of nearly 25% of the tax incentives program-approved projects over the succeeding three years.²⁶⁶

To answer the research questions, I used the broader multi-year contextual method and summarized the results in the tables of this part of Chapter Five. Because the first two methods of the program (formative) and the (summative) participants evaluations forecast that the initiation of the intervention had promise of achieving the objectives I envisioned in the logic model, I continued the online learning course for a second year, and it is now in its third year.

Parts I and II of this chapter did generate results previously reported for the formative for the evaluation of the program of Learning Places as an organization and summative for each participant enrolled in the online course, so the triangulation procedure from REAP made use of the third way called constant comparisons to help generate a theory from the many observations. The findings presented in this section suggest that an online tool can, with some important limitations, lead to the knowledge necessary and attitudes that support greater utilization of existing historic preservation tools.

²⁶⁶ The private sector in partnership with developers and the housing / poverty nonprofits in the civil sector can build energy efficient affordable starter homes or multifamily apartment or townhomes. The tables report on housing in the study area and the widening needs that could become the right incentive for architects to volunteer and have real-world experience. Through Learning Places, they could learn about adaptively using historic structures for affordable housing. Rather than be a future exemplar going forward, the Montana legislators ²⁶⁶ passed a law precluding inclusivity as a progressive local policy. This relegates low income housing even further towards the private sector.

9. Ensure the information from the evaluation is used			Note: use Appreciative Inquiry	
Evaluate at 3 Levels →	Addresses causes; Action Plan for future cohorts; alleviates effects.	Feasible recommended changes with stakeholders; practical. oral history interviews add to record.	Info. To decision-makers. flows from findings; solutions to problems; invite others' solutions; responsive to optional solutions; ensure change; affordable.	
	Monitoring evaluation process, monitoring episodes	Transfer of Learning applied in professional life.	Determine values with stakeholders, sponsors, consultants, instructors.	

Figure 51. Hierarchal Segment—Evaluation Information

During the six-module-long course, I was fortunate to have the chance to observe participants from across the United States. I observed highly motivated service learners choose to go further after completing the basic core lessons and seeking extra credits. The Learning Places platform link to the Historic Preservation Education Foundation enables an ever-increasing number of Preservation Brief Quizzes to yield more LU/HSW ²⁶⁷ continuing education credits for the learner who wants to maximize their competency gains. Those choosing to complete the extra credits were offline from the Canvas LMS, so I could not observe their taking quizzes or receiving certificates from the AIA. Instead, that was a relationship between the learner and one of the preservation partners encouraging lifelong learning resulting in additional credits to their AIA transcript.

²⁶⁷ Historic Preservation Education Fund has twelve preservation briefs currently online through the same link embedded in the online Learning Places extra credit modules. With the six learning units, LUs from, Learning Places and the twelve preservation brief quizzes one can earn an entire year's worth of credits for AIA members:
<https://www.hpef.us/special-projects/continuing-education>

I looked for the most desired behavior change when the participant partners with a host community and actualizes more stewardship. Knowing how far they progress with their preservation projects that benefited from their voluntary help would be the ultimate outcome of the whole enterprise known as Learning Places. In so doing, I was hoping there may emerge an intersection of the Learning Places participants and the reported pattern of the decades-long preservation activity engagement by local communities in each state of the study area. Ranking the preservation activity using the CC methods and combining REAP triangulation of at least three observation methods allowed me to overcome the limitations of the formative and summative methods that did not fully answer RQ2 or provide sufficient information to answer RQ3 comprehensively.

The assessment using the procedures of REAP helps the compilation of datasets of observations, inferences, and insights. In addition, REAP led me to develop my workflow for the constant comparisons method to derive conclusions while answering the research questions. The key takeaways from the findings for the research questions began with the realization that a grassroots effort by one researcher could be sustained online with the aid of Canvas LMS, and the proof of the concept occurred when the number of enrollees exceeded the initial goal of thirty participants and has grown to be over forty learners. Furthermore, those who contributed to the online community of learners by displaying an attitude of caring and choosing a special place to study in the course had already changed behaviors to preserve the chosen historic property. Resiliency, and the final section of Chapter Six, will contain derived recommendations about historic preservation's next half-century in the United States.

CHAPTER SIX

CONCLUSION, DISCUSSION, AND RECOMMENDATIONS

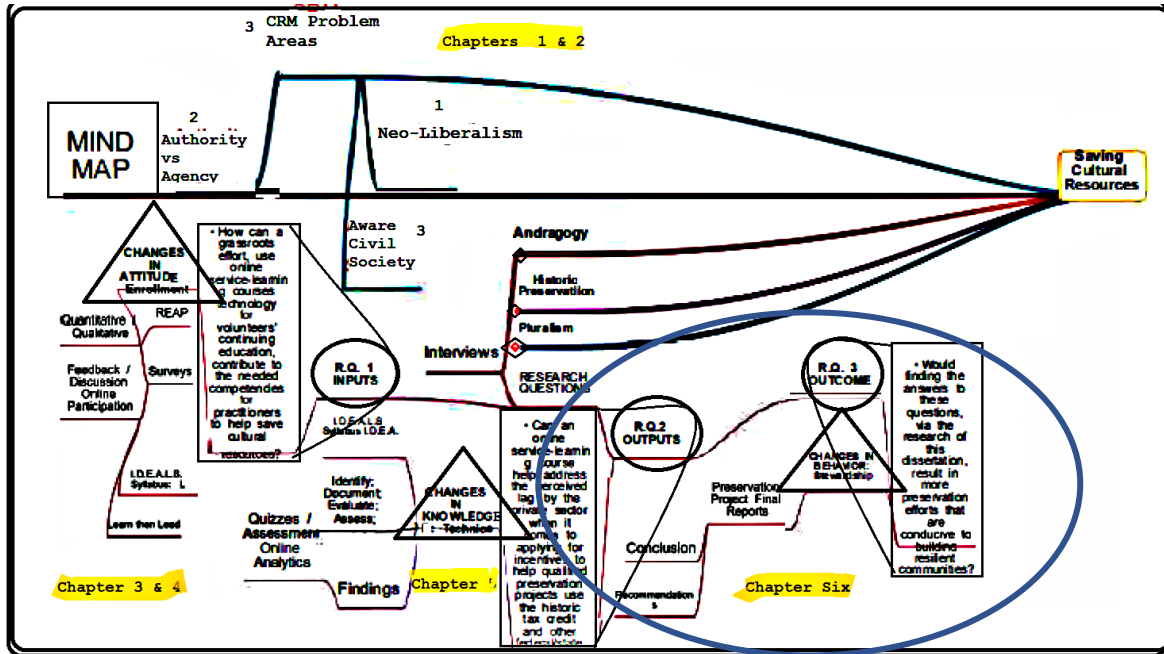


Figure 52. Mind Map of Chapter Six

Part I. Introduction to Chapter Six

As the last chapter of the dissertation approaches its last part, I will offer my recommendations going forward for Learning Places. It may well serve my project to remember that those who volunteer online work toward the sixth and last module to make a final report for their chosen project. The introduction containing this brief recounting of the service learners' part in Saving Cultural Resources by Learning Places through their mindful recommendations will help later Chapter Six passages.

In the previous Chapter Four, the Methods, and Chapter Five, the Results, provide data to answer the three research questions. The two evaluation types, formative and summative, clearly show that the participants were engaged with the online course, progressing through the modules toward their self-declared goals. The formative assessments by the instruments of the pre-course surveys and initial submission of resumes by enrollees indicated that some of the older volunteers had never tried online courses before and were very familiar with historic preservation. Some were heads of schools of architecture, on landmark commissions, and educators with the AIA. The participants who provided post-course survey reflections shared the challenges posed by the course.

However, feedback of only a few enrollees was as prescribed: relying on their completion of the pre-and post-surveys. Those who did not complete six modules decreased their activity within the assigned cohort. Their resistance took something away from the experience of the others who pursued the completion of their project. Despite repeated attempts for their input via the exit survey, they passively severed their enrollment without further word. Some others requested extensions of time and re-enroll if they could not continue within their assigned cohort. Therefore, it was essential to use observations of their brief online activity, as recorded by the Canvas LMS, to derive some data for measuring changes in their competency, attitude, and behavior.

More importantly, the ones who did reflect described their discomfort working through unfamiliar tasks. Mastering the more complex workflow to create a blog for their chosen cultural resource's final report was the single most challenging task undertaken. Completing the six modules and the summative evaluations during the course and for the final report earns a

Certificate of Completion and six learning units to report to the AIA and state licensing board. The final report will remain with the Learning Places archive. Future participants can refer to cumulative digital humanities collection of final reports for examples to guide their efforts.

The archive of final reports can grow with each cohort and serve the multiple purposes conceived of in the program's design. More importantly, it may become a rich resource that will serve future researchers for those unanticipated needs that arise in the future. For the summative evaluation, the body of work by the service learners is the last metric used for quantifying the increasing number of aspirational outcomes.

The participants' outputs will be helpful going forward as the added value for the project's cultural resource preservation plan. The outputs are both a rich record of the contributed narratives about the chosen historic places and a forward-looking plan for the most appropriate applications of preservation treatments but are not in and of themselves the desired outcomes. For a volunteer's service, they receive a certificate of completion marking their achievement and worth the six learning units required annually for self-reporting to the AIA for continuing education. The outputs are measurable and additive for the long-term summative evaluation of outcomes. For instance, a performance report over the long term may list the number of chosen buildings per year to see if that number meets or exceed projections made at the outset of each calendar year. Those measures of output are not outcomes either.

The program called Learning Places' ultimate outcome is a more resilient community thanks to the many outputs by participants. The archived final report is the capstone effort and the ultimate objective of the Learning Places program for me and the participants who sought to help save cultural resources by applying new knowledge, enabled by attitudinal changes

inspiring new behaviors. For example, measuring contributions to chosen cultural resource projects by investors may be attributable to a successful service learner's final report. In addition, the students can take part in grant writing lessons before approaching foundations.

So, in the first year of the Learning Places course participation, their outputs checked all the boxes I set up by the Canvas LMS online. The outcomes must be observed outside the course because the distant communities can weigh in with their opinion of a project's efficacy.

The Third and Fourth methods used REAP, and the constant comparisons allowed me to enhance the results covering the program and my organization's functional assessment of Learning Places; the evaluation of participants' attempting to change their knowledge, attitudes, and behaviors so there can be more preservation activity in their communities. I developed a unique way to rank the eight states in the rural west of my study area. The results of using REAP and constant comparisons gave me a snapshot of the actual world of preservation activity over the past decades that I can use as my context for a longitudinal study of change. The context generated by the research had deep background on some local area activity around Montana State University in Bozeman and those of the key informants who provided testimony to my interview questions.

Taken together, the discussions of the results and findings that contribute to my understanding of how a grassroots effort can impact the much more complex political/economic dynamics of neoliberalism, authority vs. agency, and a need for a more aware civil society precedes my recommendations in Part III. Unlike past master plans or social movements that failed to achieve scale in order to be measured against their goals and objectives as per their prescriptions for society in their manifestos, my intentions are for a third way toward the future

resilient communities’ who benefit from a corps of cultural civil society members comprised partially of graduates from Learning Places. Because the service learners have a more permanent attachment to ‘place,’ they will be the core for any host community willing to work in small groups of people acting locally, thinking globally that makes the community-based differences in the end. That has been the way it has always been.²⁶⁸

“Because the service learners have a more permanent attachment to ‘place,’ the future resilient communities will be built from the inside by concerned members who share a more permanent attachment to ‘place.’ They will be the core for any host community willing to work in small groups of people acting locally and thinking globally that makes the community-based differences in the end. That has been the way it has always been.²⁶⁹ Moreover, in this strategy, unlike past master plans or social movements that failed to achieve their visionary goals, those closest to the land will reap the bounty of a more resilient community. In addition, a beneficent new corps of cultural civil society members comprised partially of graduates from Learning Places will assist them with their newly gained competencies.

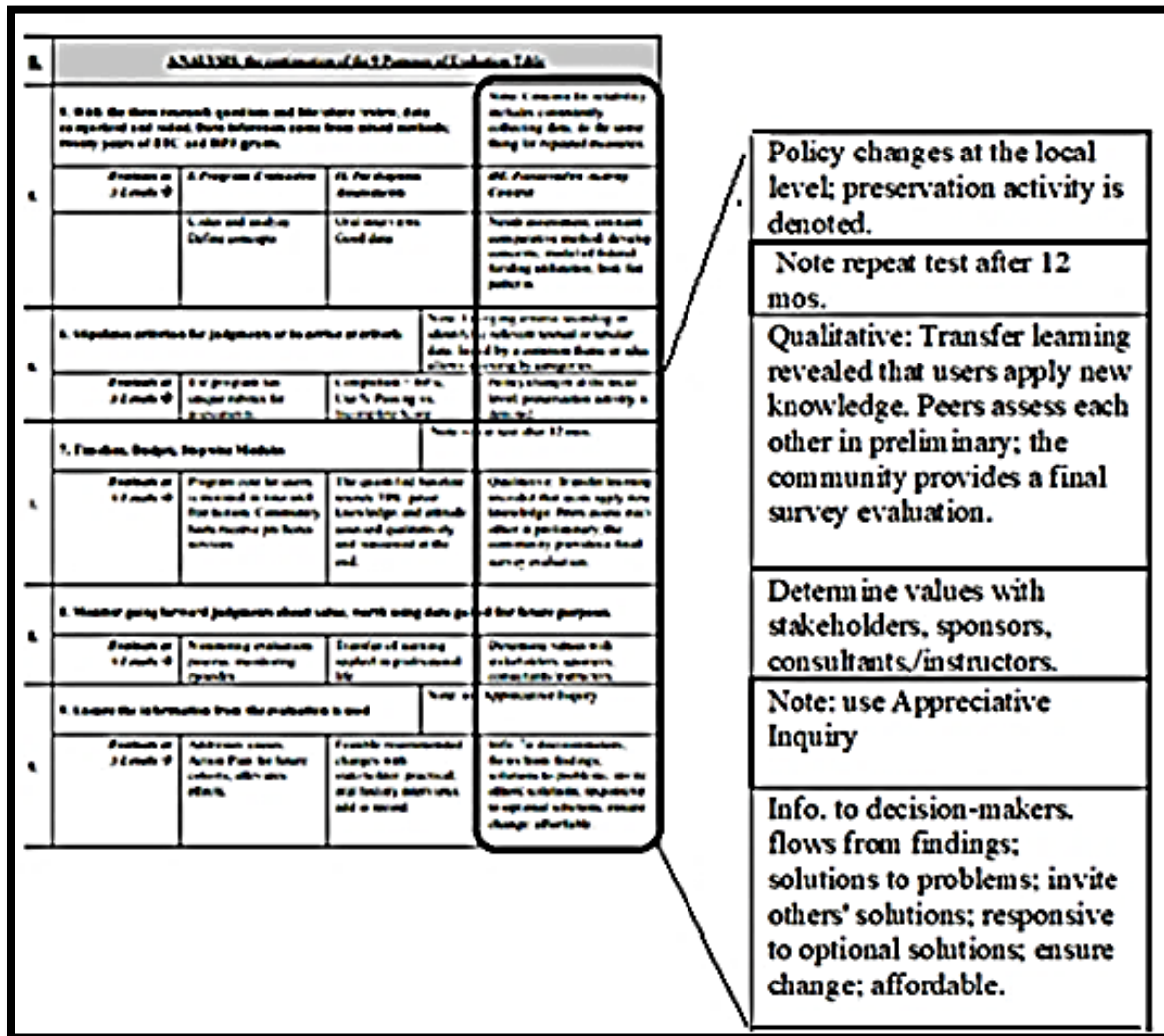
A discussion about the original three problems I identified to be hindering historic preservation: Neoliberalism, Authority versus Agency, and an Aware Civil Society research concludes in this chapter along with a summary of efforts to answer the research questions listed below:

²⁶⁸ Margaret Mead gave that advice to a large crowd at the first Earth Day teach-in at Union Square in New York City on April 22, 1970, when I met her and was moved by her humble confidence in the future of humanity.

²⁶⁹ Margaret Mead gave that advice to a large crowd at the first Earth Day teach-in at Union Square in New York City on April 22, 1970, when I met her after she gave a rallying speech about NYC pollution and not to believe the lies from powerful who would deny the evidence. Despite her warning I was moved by her humility and continued confidence in the future of humanity. “Earth Day 1970 NYC,” n.d. NY Library collection. <https://www.nypl.org/blog/2017/04/20/informed-archives-environmental>. In helping down from the stage, Mead, the President of the American Museum of Natural History in NYC, worriedly asked me if the crowd could hear her. I assured her we have listening to her message for a long time.

- RQ 1: developing an online course as a new program began from a logic model based on a scan of the environment that identified the problems and put together program elements anticipating beneficial outputs. Results for the organizational evaluation at the early stage used a formative evaluation method according to the OCAT procedure.
- RQ 2: following the logic model assessments of the participants' output as a participant-observer generated data for the states in the study area and beyond. Measuring progress toward the desired outcomes enumerated in the logic model used a summative evaluation of the participants' knowledge and attitude.
- RQ 3: the long-term projected outcomes as per the logic model were considered broadly using constant comparisons of an initial then widening study area and time frame. REAP, interviews, and constant comparison methods seek a pattern for an emergent theory. Observed behaviors and using official data from two decades of the preservation activity falsified many conjectural hypotheses. These findings lead to recommendations²⁷⁰ by broadly studying other contexts

²⁷⁰ Chapter Six Recommendations draws upon Max Page and Marla Miller's, *Bending the Future: Fifty Ideas for the Next Fifty Years of Historic Preservation in the United States*, and salient ideas researched and summarized positions for the future of the field for the next half-century in somewhat conflicting ways in the relevant Appendix F. I found those within the realm of possibility to be suggestions that deserve to part of ongoing conversations for positive impacts to the preservation activities of a more aware civil society. They can engage the policymakers rather than give up agency in the competitive public spaces where neoliberalism prevails, and authority dominates.



²⁷¹ Chapter Six Recommendations draws upon Max Page and Marla Miller's, *Bending the Future: Fifty Ideas for the Next Fifty Years of Historic Preservation in the United States*, and salient ideas researched and summarized positions for the future of the field for the next half-century in somewhat conflicting ways in the relevant Appendix F. I found those within the realm of possibility to be suggestions that deserve to part of ongoing conversations for positive impacts to the preservation activities of a more aware civil society. They can engage the policymakers rather than give up agency in the competitive public spaces where neoliberalism prevails, and authority dominates.

Looking back to what was covered in the Methods and Results Chapters shows how much this project was dependent on the annual reports by the NPS and others. The comparisons were made using over twenty years of the official data from the NPS through its annual economic impact reports of the HTC impact. It periodically displays the reports through Rutgers University, and then, in turn, the NTHP HTC coalition combines their work to give a complete picture of the tax credits matches by some states but not all since many have not yet approved granting matching tax credits. Thus, I refer to the unused tax credits by those who do not take advantage of the HTC incentives and the lack of state matching credits as an ‘opportunity cost’²⁷² (or lost opportunity) in this discussion.

“The program remains the federal government’s largest and most effective program supporting historic preservation and community revitalization,” reported the NPS.

²⁷² Opportunity Cost: In microeconomic theory, the opportunity cost, or alternative cost, of making a particular choice is the value of the most valuable choice out of those that were not taken. When an option is chosen from alternatives, the opportunity cost is the “cost” incurred by not enjoying the benefit associated with the best alternative choice. The New Oxford American Dictionary defines it as “the loss of potential gain from other alternatives when one alternative is chosen.” In simple terms, opportunity cost is the benefit foregone from the next best alternative that is not selected. en.wikipedia.org
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Table 41. Research Question 3

RQ	Problem Ch 6 Conclusion	Goal Ch 6 Discussion	Recommendation Ch. 6	Appendix Cases-in-Point / Results
3	Research Question 3 Neoliberalism: The marketplace dominates. In 1966 the NHPA passed to curtail abuse of marketplace power. However, unfortunately, the neoliberalist outlook prevails even more, today, with price outweighing value.	Programmatic input by Learning Places (LP) to fill a gap in the HP world. Organizational development of LP to improve	A). Cooperative vs. competitive approaches. B). Volunteers for Cultural Corps C). Rural Revitalization D*).Self Financing	Nonprofit: OCAT evaluation result. National Service AmeriCorps / LP strategy. AIA provider for volunteer HSW links and LU certificates.
2	Research Question 2 Authority vs. Agency: The HP field needs to be more relevant today, be more inclusive, and support local pluralistic actions.	The public participates using e-democracy via grassroots portals like LP	A)Certification as competent corps B)Pluralistic voting on the nomination	International comparisons. Exemplary projects by alums from LP show competency in actions. HTC tables of state contextual HP outputs.
	RQ	Problem Ch 6 Conclusion	Goal Ch 6 Discussion	Recommendation Ch. 6
1	Research Question 1 Aware Civil Society: To best serve with more agency needs more competency and taking responsibility for the stewardship of the past for the future.	Training for the competency of the corps crews of volunteers and informed populace/electorate	A)Cohorts continue to grow more alums B)Archives record cases by alums. C)Portal serves all to learn at LP	Cases-in-point show exemplars of final projects in LP. LP rubrics and online quiz results and use results.

The table above contains the matrix to guide the three research questions. It shows the problem area, discussion/conclusions, and recommendations. In addition, there is a cross-reference to the Appendix sections relevant to Research Questions 1 through 3.

An important finding is the net benefit to the US Treasury, \$38.1 billion in federal tax receipts over the program's life. The federal HTC costs the US Treasury approximately \$32.9 billion (in inflation-adjusted 2019 dollars) over the 42 years since FY 1978. The rehab spending

for projects certified by the NPS in FY 2019 alone was about \$1.154 billion. Furthermore, the Rutgers/NPS 2019 report reveals, “the benefits derived from the costs of tax credits for the public are the significant economic impacts,” i.e., jobs, income, GDP, and output. Notably, greater tax revenue (federal, state, and local) generated by HTC-aided rehabilitation project spending is documented annually.²⁷³

No guarantee maintains the preexisting livability of a place by virtue of the underlying zoning or even building codes. The quality of life concerns falls under the realm of the political persuasiveness by an aware civil society toward their elected officials who hear appeals. If the matter involves only private property and contract laws between private individuals, there is no standing for the public unless they assert that they have been injured and seek compensation for damages. The public may protest the loss of their neighborhood’s sense of place, genius loci, collective memories, and impacts to viewsheds and daylighting because of the scale of the built environment and other aesthetic concerns. These esoteric claims are hard to prove beforehand.

NHPA 1966 as amended:²⁷⁴ These reviews are time-consuming but have a predictable process meant to end the protracted court cases for any federal undertaking, including reviews of potentially adverse actions by others who receive federal funds or require federal permits. The 106 review asks the applicant questions; for example, those following the process must first

²⁷³ “Annual Report on the Economic Impact of the Federal Historic Tax Credit for Fiscal Year 2019,” Economic Analysis report by Rutgers University accompaniment. (Rutgers University, New Brunswick, N.J.: National Park Service, October 2020), <https://xoxyohh9fh753j91bj7hl15l-wpengine.netdna-ssl.com/wp-content/uploads/2020/11/economic-impact-2019.pdf>. Annual Report on the Economic Impact of the Federal Historic Tax Credit for Fiscal Year 2019 “The study utilizes the Preservation Economic Impact Model (PEIM), a comprehensive economic model development by Rutgers University Center for Urban Policy Research for the Technical Preservation Services, National Park Service in October 2020. The NPS issues annual reports on the HTC program quantifying the number of historic rehabilitations certified each year, their reported costs, and other statistical information on the program. <http://www.nps.gov/tps/tax-incentives.htm>,

²⁷⁴ The training for all new federal agency executive level staff is provided through the National Preservation Institute but is not required to be taken by State, County or City officials. They are welcome to study the Section 106 Review process course offered by NPI. Claudia Nissley suggests the online version will answer the questions listed.

identify cultural resources in harm's way, and a specific training course by the National

Preservation Institute addresses these topics:

design projects to avoid those resources; if possible, avoid, preserve and protect identified unique areas---since they cannot be recreated and they have existed as multi-generational resources---remember to talk with people. The regulations state formally how historic properties may be adversely affected. Consultation and good listening skills will aid the resource identification effort.²⁷⁵

Learning Places enrollees can use links to these higher-level technical pieces of training, and those on the website of NPI can find the link to Learning Places in symbiotic reciprocity. A mindful city planner may avoid months of animosity by holding local forums to air current concerns. Thus, the development community will be forewarned of these pleas to be heard and adapt their plans accordingly. That would follow the proverbial *caveat emptor* or let a buyer beware. The developers' next steps would be to work with a committee of community advocates to draft up alternatives covering the spectrum of profitability and community interests by sharing the project's prospects with all interested entities and individuals, especially next-door neighbors.

When this is not the course of events, there have been protests. A particular form of protest developed in the 1980s offered a chance for a positive expression of the residents who do not want the project to be built as originally conceived. This form of protest is perfect for those enrolled in Learning Places to take a lead role. One positive form of demonstration of a community-based vision for the future is called 'counter-mapping.' These exercises allow the community to emerge its hopes and fears of the existing community as organizers facilitate²⁷⁶

²⁷⁵ Claudia Nissley, "National Preservation Institute," *NPI Course Catalog*, n.d., www.npi.org. Nissley, Claudia. "National Preservation Institute," n.d. www.npi.org.

²⁷⁶ Paul Lachapelle, Eric Austin, and Daniel Clark, "2010 Community Strategic Visioning as a Method to (Anaconda, 2010).

and residents have their voices heard about the affected neighborhoods pushing back against an unacceptable master plan. If the proposals by private developers are projecting no future for current residents and displacement seems inevitable, seeking alternatives to adverse effects may be assisted by those Learning Places graduates or enrollees who can identify the cultural resources amid their urban landscape the built environment. They can identify how past residents and current ones are tied to a legacy that is ignored as a deepening inequity overshadows the historical identification with neighborhoods and well-used public spaces, streets, parks, sidewalks, shops, and some vacant lots turned into communal gardens. People who have maintained their community have created a desirable sense of place, but the inequity of their financial status cannot compete. Newcomers offer prices, sometimes in cash, paid by the newcomers who have never lived in the old neighborhood, now a gentrifying area. Rising real estate appraisals due to demand force sales inflated like another bubble that brought down the economy in 2008. Displacement does away with the layers of public memory attached to the public spaces and older buildings potentially eligible for listing on the NR.

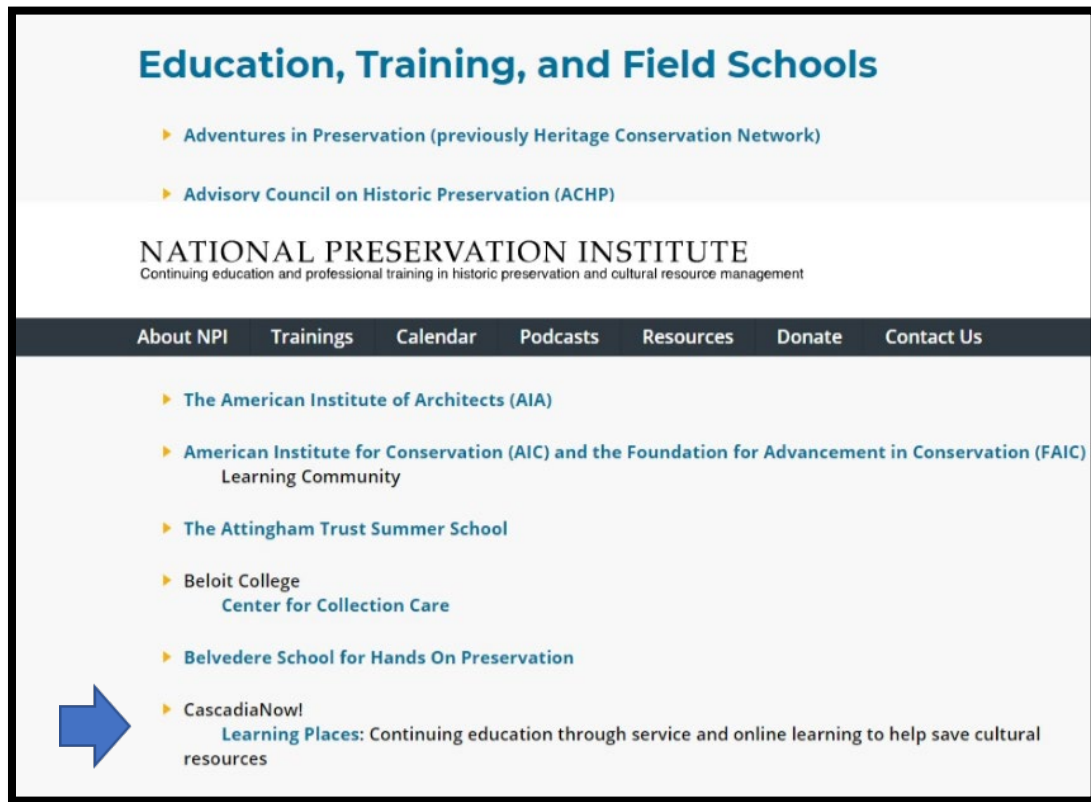


Figure 54. Education, Training, and Field Schools

Besides the documentation of significant landmarks through learned technics such as re-photography,²⁷⁷ there are ways to attach attributes to those maps that recount the narratives of significant past events in the area under study. These GIS-aided story maps allow for adding testimony from the people who once lived in those neighborhood treasures who still work and play in their streets. These demonstrations of community aspirations occurred within indigenous areas to protect natural resources. The method enables more community participatory mapping inspired by the desire to have more agency. It can threaten the dominant economic interests as it

²⁷⁷ William Wyckoff, *How to Read the American West: A Field Guide*, Weyerhaeuser Environmental Books (Seattle: University of Washington Press, 2014)..

____ “On the Road Again: Montana’s Changing Landscape”, produced by the Museum of the Rockies. The exhibit is based on a book by William Wyckoff published in 2006 by the University of Washington Press.

raises discontent about the status quo and future gentrification. It has been done somewhat successfully and will never be in vain if it raises agency and community awareness.

In rural towns in Western states, the disinvestment of the extraction industries left places that became ghost towns and the poster child of unchecked neoliberalism of the past century. The industrial, agricultural corporate farming factory system, favored by federal largesse, displaces the small family-run farm economy if they do not assimilate and grow crops on much larger farms. “The last best hope for people in rural areas is to work together rather than separately—to choose interdependence over independence, cooperation over self-reliance, and sustainable community development over industrial economic development.”²⁷⁸ The deindustrialization of the rust-belt of America in the seventies was a casualty of neoliberalist globalization profit motives costing hundreds of thousands of good-paying jobs in the United States. Unfortunately, the phenomena have swept up the farm belt:

organizational level account of moral action matters for two reasons. First, organizational decision making involves more than the mere summation of the moral arithmetic employed by the various individuals who constitute a decision making group, for instance a top management team. Optimal organizational decision making accounts for the interest of the organization as a whole, a distinct social entity that has its own unique desires and interests. Some interests may converge cleanly with those of its individual members, such as a desire for greater revenues and wages; however, those interests may also diverge. For example, translating all revenue gains into wage gains (the desires of employees) jeopardizes the organization’s viability by leaving²⁷⁹

The city consumer relies more on developing consumer-supported agriculture (CSA) and understanding that dynamic could help farmers form alliances with the fifty thousand and

²⁷⁸John Ikerd, “The Economic Colonization of Rural America; Increasing Vulnerability in a Volatile World” (Rural Sociology Society Annual Meeting, Columbus, OH, 2017).

²⁷⁹Paul C. Godfrey and Ben William Lewis. “Pragmatism and Pluralism: A Moral Foundation for Stakeholder Theory in the 21st Century,” Brigham Young University, 2018.

growing members. In the overbearing calculus for profit margins based only on price alone and corporate quarterly reporting cycles, neoliberalism's industrial agriculture monopolies short-change all of civil society by ignoring the social costs of their enterprises while being boosted by powerful lobbyists. This dramatic example can illuminate why those who could have been rehabilitating the inherited historic agricultural structures have ignored using the HTC. They are said to be reluctant to be entangled with the federal government's programs. The costs of maintaining the income-producing old barns and farmhouses qualify just the same as that of the built environment situation in the cities and abandoned factory buildings. The expenses to maintain and reuse historic properties, if assisted by using the HTC, reduce personal income taxes or syndicates buy those credits through brokers if they need tax shelters. By taking the tax credits like HTC, people can use another way to be more self-sufficient. Why in the current political economy doesn't HTC catch on in the agricultural economy?

One answer came from a professor of community development for the rural extension services. To paraphrase his response, he would place that question right behind what he found to be a nonstarter, climate change and its prospective impacts on rural communities. He found those who read his extension postings aligned themselves with climate change deniers and are nonresponsive to global issues despite needing foreign markets for exporting crops and beef. Add to this the often-mentioned mistrust of the government programs that agriculture became dependent upon ninety years ago during the Great Depression. Their misgivings are attributable to "the widening rural-urban divide since the early 1990s seems to confirm a transition in rural attitudes from impotence and dread to desperation and anger," emeritus professor at the University of Missouri. His remarks explain the problematics of the descendants of the

nineteenth-century settler-colonists of the western frontier territories colonized just as those indigenous they displaced. The fate of Jefferson's yeoman citizen farmer idealization has fallen victim to what the third president hated the most, the factory mercantile class corruption he found in European cities. Several utopian planners have offered a middle way to provide more open space and fresh air following Ebenezer Howard's Garden City concepts for the UK. Frank Lloyd Wright offered a Broadacre City concept to live in a new community outside the city and have an acre for self-sufficiency per homeowner. Unfortunately, too many have been displaced by urban renewal or made redundant by deindustrialization for too long. At the same time, the government cut progressive programs for housing assistance and community revitalization—the neoliberal appeals to voting blocs and candidates by calling for more jobs and a smaller government.

This disenfranchisement happened over the past century, and yet the rural voting bloc does not align itself with urbanites who face a similar plight as per Dr. Ikerd's paper. No longer are Western nations colonizing this modern version of empire. Instead, it is the largest multinational conglomerates that do it or the autocratic regimes in Asia and South America, and it has been very profitable. The global revenues are at historically high levels (above \$50 billion for some), as they continue to entrepreneurially fleece the taxpayers by assuring their claim to continue federal agricultural subsidies through their powerful political lobbyists. They enjoy these tax reductions for their businesses while eschewing the environmental costs of their corporate excesses.

There may be a middle way to manage the common pool of natural and cultural resources through volunteer grassroots efforts. Guiding the development of Learning Places have been the

many examples based on communal stewardship, not a heavy hand of government but helpful outreach, nor the taking by large landowners without doing their share of the cleanup work and covering costs equitably amongst stakeholders in a conscientious manner (guided by the old advice of *noblesse oblige*).

In 2006, a book by Yochai Benkler,²⁸⁰ *The Wealth of Networks*, extolled the “cheap computing power plus networks enable people to produce valuable products through non-commercial processes of interaction: “as human beings and as social beings, rather than as market actors through the price system.” The digitally aided “decentralized individual action carried out through widely distributed, nonmarket means that do not depend on market strategies” is the “commons-based peer production for collaborative efforts based on sharing information.” Learning Places, designed to be a “free and open-source,” uses the LMS Canvas software and encourages access to sites that Google makes accessible for its users.

E-democracy technologies enable the public to have a less litigious way of participating. Digital public venues, where all stakeholders can be heard and hold public meetings, can make political decision-making amongst the plurality more inclusive and transparent going forward. The tech-aided medium is a welcome change compared to the old spaces, described as ‘smoke-filled²⁸¹ back rooms’ where deals were made by the powerful without any oversight by others. Information communication technology (ICT) has made it possible to govern remotely via the internet one can also treat medically and educate virtually, especially during 2020 pandemic

²⁸⁰ Yochai Benkler, *The Wealth of Networks: How Social Production Transforms Markets and Freedom* (New Haven London: Yale University Press, 2006).

²⁸¹ There has been progress, those back rooms are no longer allowed to be smoke filled. Instead there are vaping clouds of pungent smelling legalized cannabis in the air.

constraints. This is possible if all of the populace is digitally ‘wired’ with this capability. Internet connectivity should be a public utility subsidized for the disadvantaged and remote citizens at a basic level for all. The internet for everyone as an essential public service without commercialization is a franchise everyone will need going forward. Denying anyone access to basic ICT connectivity will not be constitutional, the same way voting access is supposed to protect all.

The launch of Learning Places is more than another way to earn continuing education units. As a digitally based forum enabling those who share their volunteer efforts to make their communities more resilient, one can use the virtual connection to save a chosen cultural resource cooperatively.

There are three parts of the following Part II for Conclusions for the dissertation in this Chapter Six. In Part II.1 Authority versus Agency the discussion of this identified problem leads to Part II.2 related discussion of the reported disconnect between architects and preservation. The last part, II.3, introduces the contribution by key informants to the inquiry of the HTC program lag in the rural Western states.

Part II. Conclusions:

I present results from the interview question responses and the pertinent literature review regarding the three problem areas that hinder preservation activity. Finally, I share my opinion after studying as many factors as possible that key informants related to my inquiries.

Part II.1 The Problem Area of Authority vs. Agency

In many communities, some insensitive developers and their allies amongst the elected officials, associations of building contractors, and consultants consider the required public forums as a nuisance even if done virtually. Their preferences can remind one of Arnstein's Ladder, where mere tokenism or worse is at play.

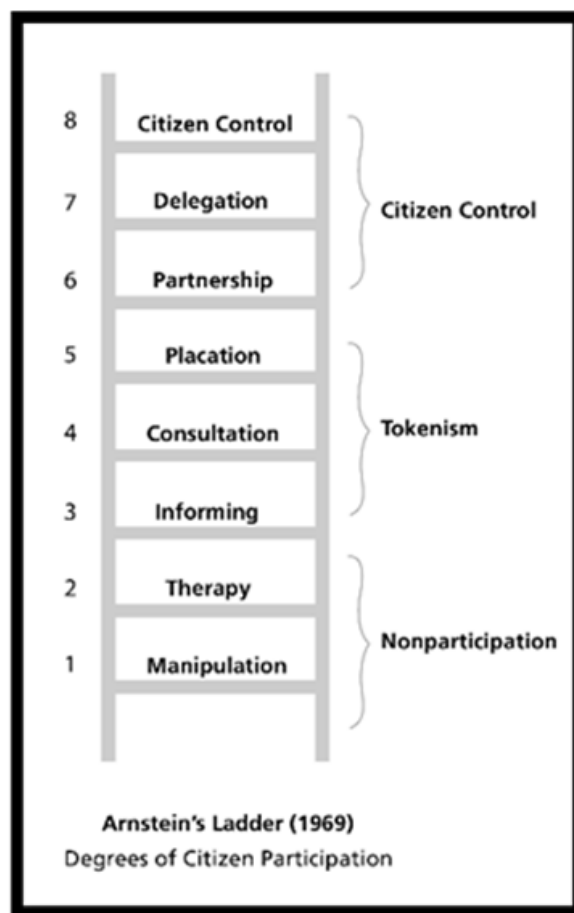


Figure 55. Arnstein's Ladder for the Degrees of Citizen Participation

Under this outdated policy-making system, the courts get backlogged, and the few who benefit are those receiving the legal fees. Judges can act like the biblical Solomon and make unwanted, poorly informed compromises by demanding mitigation for expected damages to a

natural resource. Implementation of those measures may occur if one holds the exploiters' feet to the fire.

However, when the demolition of a cultural resource is permitted, the mitigation is often woefully unsatisfying since it reduces what was once a part of the public space and collective memory into a historical record supplemented by required photos. Moreover, even an NR-listed property is vulnerable to removal under private property rights if a preponderance of evidence for a successful court fight despite public protest.

Private entities have been allowed to invoke the government's realm of eminent domain and condemn properties as in the urban renewal era if the outcome serves a higher public need, like a shopping mall. Legal precedents promise barely any protection, but political pressure and creative alternative funding sources to buy out a would-be demolisher have worked. For a disenfranchised populace awakening to the reality of neoliberalism commanding more respect than community values, the rebalancing of power requires returning the authority to the people who prepare themselves to exercise their agency. To prepare oneself requires access to ongoing learning opportunities.

Organizations for the promotion of historic preservation education helps in the promotion and provide data for analysis to add to the dissertation. There is evidently a significant variation amongst state offerings of HP educational programs. NCPE has recognized only ninety programs in just twenty-eight states. Amongst these NCPE members, there are only six Ph.D. programs and twenty-two masters' programs members of NCPE. There are mostly certificate programs, 33, and only half dozen associate and bachelor's degree programs: AAS 5; Minors 5; and 10 BA/BS. The disparity of geographical location of these member programs is evident in rural

Western states. Only three states from the study area have NCPE member programs. The other five states in the study area are without NCPE member programs, even though there are schools of architecture in Idaho, Montana, Utah, and Nevada. Wyoming does have a master's in AMST where students can focus their studies in historic preservation. An alum of the program in Wyoming did the nomination of the historic district for Montana State University.²⁸² Those five states had the lowest utilization scores for HTC and the overall HPI quotient based on my comparisons and ratings. The other states on the west coast or Southwest with only one NCPE membership include California, Hawaii, New Mexico, and Arizona. Besides the five states in the study area, there are eighteen others without any member programs of the NCPE; see the map below:

Part. II.2. Architect Disconnect with HP

Architects who enrolled in the first year of the online course offering responded to the Historic Resources Committee webpage on the AIA website. Most subscribers to this knowledge group of the online communities supported by the AIA receive an email update whenever there is a new posting to the page, and they can follow the chain of comments as they choose to participate in the ongoing discussions.

Usually, six new enrollees responded and were placed into a new cohort following the announcements online for open enrollment for the next six-week session. My subscription to the Historic Resource Committee message board for this knowledge community proved to be the

²⁸² National Register nomination of MSU was done in time for the 125th Anniversary of the university in Bozeman, MT. The architectural historian Nunn completed the nomination which is included in Learning Places for enrolled learners to use in an alternative final assessment.

most productive marketing effort grossing 40+ enrollments in the first year alone. Most of the firms that publicize their architectural experiences on AIA directories, advertising, or the State of Montana's Historic Preservation Office's professional service list of practitioners²⁸³ claimed their past experiences and capacity, including working with historic resources. Periodically, 72% of the thirty-two firm profiles paid for the magazine ads and listed historic preservation as a service.

There are over 450 architects listed as members of the Montana AIA, a statewide organization that is only 33% of the architects licensed to practice in Montana. Many more employees of the larger firms are either not licensed or Montana AIA members. No examination or training regimen produces qualified preservationists trained equally as other signatory countries to the UNESCO / UN membership agreements (called charters or protocols) for heritage conservation. Although the NPS has standards for the qualifications, the individual states are the only licensing authority, and there is no license for preservationists, only architects. The State Historic Preservation Office provides the public with a listing for Montana architects who want clients to know that they have historic preservation capabilities. However, the list comes with a disclaimer that speaks volumes about the missing certification process:

²⁸³ The State of Montana list has 70 architects listed and seventeen tradespeople who work on the crafts or contracting for historic preservation.

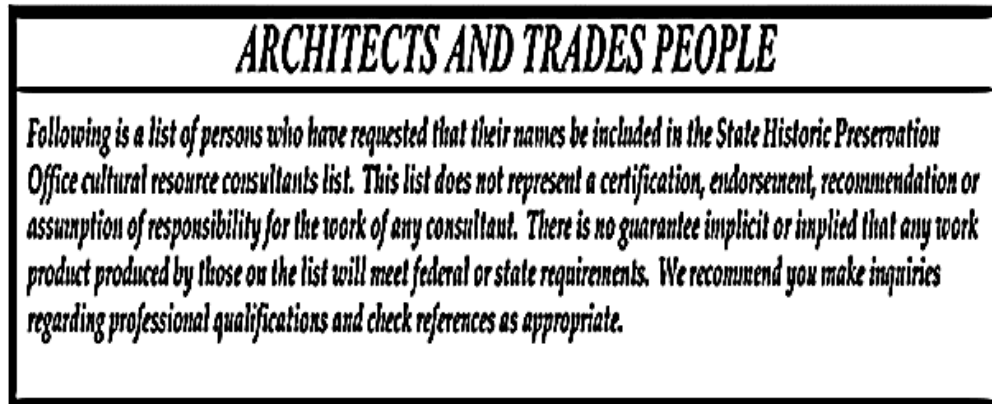


Figure 56. The State of Montana Historic Preservation Office's Disclaimer

I perceived that a disparity in qualifications divides the people from participation and requires more educational opportunities in HP for increased competency. The curriculum leading to a master's degree is the minimum requirement for CRM credentials with NPS professionals who administer or consult on HTC's projects, 106 Compliance, consultation with Tribal entities, assessments of effect, and NR nominations. The OMB reported 2,800 nominations per annum, and the cost of nominating and review was 226k work hours.

When I asked why there was a lag in preservation actions that took advantage of the HTC, I never heard the kinds of candid answers found in a recent search of the AIA Historic Resources Committee webpage. Using the HTC is done both for the sake of the client and the project's financial success; despite the number of practicing architects who self-claim preservation experience in Western states, the actual number who work on HTC projects is far less than claimed. Openly discussing the perceived differences in the fundamentals of an architect's service to their client compared to a non-architect preservationist was not a topic shared with me. The training staff contractor for the States continuing education updates to the ICC building codes referred to preservationists as hysterical, not historical, and always got a

laugh out the crowd from the construction industries. Therefore, few broached the subject probably because of my reputation as a historical architect/educator and, more importantly, devoted to a ‘cause.’ Therefore, the uneven availability of higher education and the hostile attitudes of continuing education providers to the building trades has made preservationists uncomfortable since they are pigeonholed into the same fringes as environmentalists. This ‘anti’ attitude is prevalent even though the facts of the matter show that tourists come to see the beauty of the environs in the Last Best Place or recreate in its blue-ribbon fishing streams and rivers then dine in historic restaurants and hotels, making hospitality the second highest source of Montana’s income. That is nothing to laugh at, I believe.



Figure 57. NCPE Member Schools

Note the absence of the National Council Preservation Education certified member programs in the rural Western states. The gaps in higher education in the rural Western states are apparent. Exceptions are the metropolitan areas in Seattle, Denver, and Eugene. The research for

RQ I—related to competencies needed by practitioners—involves searching educational programs using keywords such as historic preservation, rehab, remodel, renovation, conservation, heritage or history, historical architecture.

Tables comparing the scant offers of higher education in historic preservation are in Appendix E. Besides fewer schools of architecture in the rural West, there are also fewer historic preservation degree programs in the study area. The largest cities' higher education institutions have both degree programs, and not all rural state universities offer architecture. Occasionally HP electives appear in the curriculum offered in state schools in various departments besides architecture and planning, including history, American studies, art, art history, and conservation.

The five and a half or six-year masters in architecture programs and the profession have been the subject of student research at the University of Oregon for an apparent disconnect between those studying for a Master in HP and M. Arch. Surveys by the graduate school masters' degree candidates have contributed to this often ignored problem of the disconnect in academia for a subject that shares the same roots, buildings. Most schools with both tracks have to share the same facility and most of the same faculty. Measuring the gap in present course offerings in the rural West led to inequity in the distribution of the HP educational programs on campuses of higher education.

Will a new intervention be necessary that will demonstrably contribute to the needed competencies for practitioners?

Table 42. Growth of HP Programs in Higher Education

<u>Decade</u>	<u>STATE</u>	<u># Deg</u>	<u>HISTORIC PRES</u>	<u>ARCH./HP DEGREE</u>	<u>ARCH NO HP</u>	<u>AMST/ HP</u>
<u>1956</u>	<u>NY*</u>	<u>1</u>		<u>M</u>		
<u>1960s</u>	<u>VA</u>	<u>1</u>		<u>M</u>		
<u>1970s</u>	<u>VT, FL, TX</u>	<u>3</u>	<u>C</u>	<u>2M</u>		
<u>1980s</u>	<u>WY</u> <u>NM,</u> <u>NY, PA</u> <u>OR</u>	<u>8</u>	<u>C, V</u> <u>C</u>	<u>M</u> <u>3P</u> <u>M, V</u>		<u>M</u>
<u>1990s</u>	<u>CO</u> <u>DC</u>	<u>2</u>	<u>P</u>	<u>M</u>		
<u>2000 +</u>	<u>UT,</u> <u>CO, WA</u> <u>MT, ID</u> <u>AZ, CA</u> <u>TX, FL</u>	<u>1</u> <u>5</u> <u>3</u> <u>2</u> <u>5</u>	<u>3C</u> <u>1C,</u> <u>1CRM /1C</u> <u>1CRM, 2C</u>	<u>M</u> <u>M</u> <u>M</u> <u>2P</u>	<u>1</u> <u>2</u>	
<u>2000+</u> <u>Cont'd</u>	<u>MN, GA,</u> <u>NH, TN</u> <u>MA, MI, DE</u>	<u>2</u> <u>3</u> <u>4</u>	<u>2CRM</u> <u>2CRM</u> <u>4V</u>	<u>P</u>		
<u>Total</u>	<u>25 States</u>	<u>40</u>	<u>20</u>	<u>17</u>	<u>3</u>	<u>1</u>
<u>NCPE</u>	28 States	<u>90</u> <u>Prog.</u>	Three NCPE Members have programs within the study area: WA, OR, CO			
<u>Notes:</u>	P = PhD (6), M=MASTER (22), C = CERT. & BACC (48),					

In Table 42 above the progress over the decades for offering a historic preservation curriculum is tabulated.

In a recent string of AIA web posts, there are even more candid and insightful discussions²⁸⁴ around a posted question: “there appears to be a disconnect between architects and

²⁸⁴ The perceived disconnect was the thesis question posed, by a University of Oregon graduate student, Skylar Kapri Leavitt, Dual Degree candidate in Architecture and Historic Preservation, unpublished thesis.

preservationists in practice and perception. Do you feel that there is a disconnect?²⁸⁵ What do you think are the causes of this disconnect?”

A selection of a dozen responses follows to help discern where the disconnect lies between architecture and historic preservation and why.

There are published sentiments dating back to WW II, excerpted from the 1990 AIA Historic Resources Committee publication. It is very informative to show how much has not changed in the past century. In 1990, Melisa Houghton et al. published *A Report of The American Institute of Architects Committee on Historic Resources* (HRC) in celebration of the centennial of the HRC founding.

Gaede went on to explain this lag-time at the national level.

The fact is that the majority of practicing architects in the post WWII era could not care less about historic preservation. To be excited about that subject was viewed by most chapters and individuals as being hopelessly out of step if not "flaky." The practitioners of architecture were among the worst offenders in the 1950-1970 era in contributing to the demise of our heritage via actively supporting renewal programs and vigorously altering the surviving buildings to the then current mode with small regard for the original.²³⁰

Figure 58. Architect’s Disconnect Quote I Excerpt from a 1990 AIA Report

Because the AIA published this report, its salient quotes are copied here as excerpts and attributed to authors, including the relevant footnotes.²⁸⁶

²⁸⁵Skylar Kapri Leavitt, Terminal Project June 2020 University of Oregon An unpublished thesis project.

²⁸⁶ A Report of The American Institute of Architects Committee on Historic Resources, in Celebration of the Centennial of Its Founding.” Wash., D.C., February 1990.; “A Report of The American Institute of Architects Committee on Historic Resources, in Celebration of the Centennial of Its Founding.” (Wash., D.C., February 1990). The footnotes from the 1990 report are included as footnote quotes herein this quote:

The problem, I think, is that preservation has suddenly developed in a huge national enterprise. This proves the success of the efforts of all who have worked in preservation over the years, but there are too few people in the architectural profession, in government and in other fields who know how to handle preservation. A lot of old buildings will become victim of that success unless we can do some fast educational work beginning with the architects.²²³

Figure 59. Architect's Disconnect Quote II Excerpt from AIA Report

The excerpts are in their original typewritten format for effect and to remind that the times march on, and so does technology and font style. Nevertheless, there is not much change in the alleged disconnect narrative: The NPS chief historical architect Charles Peterson was receiving more responses from architects in this April 21, 1980, letter (excerpt²⁸⁷ from Harvie P. Jones to Charles Peterson):

When the government entered the field with the Preservation Act of 1966, the demand for qualified professionals escalated. Not only was the average citizen becoming a proponent of preservation, so was the government. A survey of architects conducted by the AIA in 1971 revealed that 77.1 percent of the firms questioned had done building remodeling in the preceding two years.²²⁰ The Committee on Historic Resources also grew during this time period.

. . .the H.R.C. is now one of the biggest and most potent in the AIA. Unlike years past we now have a good budget, excellent staff, and a direct line to the AIA Board and President. We have a 100% batting average and one hell of a powerful and effective historic resources force.²²¹

Figure 60. Architect's Disconnect: Letter Excerpt from Harvie P. Jones to Charles Peterson

²⁸⁷ Houghton, Meliisa et al. ; “; A Report of The American Institute of Architects Committee on Historic Resources, in Celebration of the Centennial of Its Founding.” Wash., D.C., February 1990. As part of the research of this essay the author, Melissa Houghton, wrote to ten current and former members of the HRC asking them to describe the role of the architect in preservation and the role of preservation in their practice. Responses were received from Giorgio Cavaligieri, Bernd Foerster, Robert Gaede, Walker Johnson, Harvie Jones, Alfred Staehli, and Samuel Wilson, Jr. The Architectural Collection of Harvie P. Jones, FAIA, Dept. of Archives/Special Collections, M. Louis Salmon Library, University of Alabama in Huntsville, Huntsville, AL. Jones Collection Box 1 Folder

1.http://huntsvillehistorycollection.org/hh/index.php?title=Category:Harvie_Jones_Architectural_Collection

The most flagrant “disconnect occurred when Cavaglieri was working with the local civic group fighting the demolition of the Grand Central Station in New York City,” and he took a pro-preservation stand “against the opinion of the then president of our chapter.” He spoke out in favor of preserving the landmarked Grand Central Station, a case that had to be settled by the Supreme Court when the same railroad that demolished the Pennsylvania RR Station turned its attention on the other NYC flagship station in its desperate hope to save themselves from bankruptcy. The Supreme Court ruled that real estate developers are not guaranteed a profit when they buy landmark buildings with plans to demolish them, thus diminishing the public welfare.

The NYC AIA chapter preservationist’s advocacy did not sit well with the national organization either, “the official position...was still the one geared to ‘newer and bigger is better’ which was fostered by all our largest firms.”²⁸⁸ It would take more time, until the eighties, before the national AIA caught up with public sentiment.

This independence might also conflict with the national body.

. . .in the late 1950s many of us architects in New York City participated in the actions which eventually led to the creation of a landmarks preservation law a few years later. . .the official position of the A.I.A. was still the one geared to “newer and bigger is better” which was fostered by all our largest firms.²⁸⁸

Robert Gaede basically agrees with this assessment of the profession when he writes about the rise of preservation.

What equally turned the situation around to one favorable to preservation, was a broad-based change in public opinion from one supportive of renewal for its own sake to one supportive of preservation. Many reasons can be cited for this. Unfortunately, leadership by the AIA cannot be included since it remained so minuscule through the 50’s and 60’s, gaining a bit in the 70’s and gradually catching up with the mainstream in the 80’s.²²⁹

Figure 61. Architect Disconnect: Excerpt from “A Report of The American Institute of Architects Committee on Historic Resources”

²⁸⁸ “A Report of The American Institute of Architects Committee on Historic Resources, in Celebration of the Centennial of Its Founding.” Wash., D.C., February 1990. Melissa Houghton, ed.

Part II.3. The Third Sector of Society

The third sector of society comprises nonprofits, religious organizations, humanities, and cultural associations, unionists, who fill the gap between a government (or ruling monarchy/autocrat/despot) and the private sector and commerce between corporations and trading partners. In the 1980s, civil society took notice, and the AIA response was somewhat calculated in endorsing the 1986 Tax Reform Acts that included a new credit for rehab costs of historic and older buildings. However, with the demise of older neighborhoods and many empty lots, downtown was simply used for parking commuter cars. The inner-city public became aware of the thin line protecting American democracy from abuses of state power by urban renewal authority promoters. Furthermore, without any citizen participation, the finance and housing sectors conspired with redlining areas of the city to disinvest in because there was overt discrimination toward the predominantly minority population. This abuse was also finally challenged due to other successful civil rights demonstrations and precedent-setting court cases.

There is another issue compromising historic preservation in rural America since the big government days of FDR. The rural-based descendants of those who eschewed the federal interventions of the recovery efforts during the Great Depression in the Western states are still wary of entanglements with the government, even with those programs designed to help a broad class of people.²⁸⁹ After years of accepting subsidies or applying for allotments of grazing land

²⁸⁹ Barry Sulam, "Warren Era Historic Structure Reports," (unpublished manuscripts, for Grant-Kohrs Ranch NHP, 2002). Powell County, Montana, the grass fed cattle could survive their winters in Deer Lodge as Granville Stuart and later Conrad Kohrs counted on after the terrible freeze of 1886 killed open range public land grazing for most. During the Great Depression those who stayed in ranching were an independent sort and did not vote for Democrats like FDR. When offered the free outhouses that were built as a work project for the unemployed these rugged individuals would accept but defiantly renamed them Roosevelts. This may have begun the Depression era impertinent expression that one was visiting the President USA when actually doing what every does naturally. See other Ibid. Warren Home; Barn; Ranch complex.

that amounts to some personal gain, their mindset resists the oversight by the government into their lives. Resulting disputes have become a matter of legend for the iconic mythmakers of the ‘Cowboy and the Indian,’ a trope usually involving some robber baron and the distant bureaucrats in Washington. Land grabs, permits for the extractive industry to outsiders, limited forestry, farm to market price and quantity controls, barring access to public land, enforcing pollution controls all combined to create a rift between outsiders (especially government ‘men’ like the revenueurs during prohibition who busted up bootleggers stills) and the rugged individuals living off the land.

One indicator of how truly independent a state’s economy, government, and residents revealed a convincing contradiction of the myth of the ‘self-made man’ who fights for the freedom to go it alone without government help. When the fighting back escalates to include the collective of rugged individuals at the state level, they find cooperation with conservative political PACs from the extractive industries who can undoubtedly amplify the cause and the volume of the protesting voices. Those demanding more liberty and less government for their states come from, coincidentally, those most dependent on federal appropriated taxes collected from all other states. The variations in states’ dependence on federal subsidies lists the top ten who cannot run their local /state government on their tax revenue. The list places Montana at number 6, of the most dependent at 41% federal funding to run the state government. (Wyoming is at 42% federal to state government subsidy). The states’ residents are also ranked according to

their dependency, and Montana fares a little better, at 15th. The overall ranking gives Montana a total score of 63.8 and places it ninth of the top ten most dependent states.²⁹⁰

Several experts in the preservation field have attributed the lagging utilization of the HTCs for ancestral historic rural agricultural structures rehab to this persistent myth of the rugged individual. This could contribute to the intransigence of rural folks to government aid. I pursued my inquiries with key informants, and one of the State Historic Preservation Officers²⁹¹ offered the only helpful response about an agricultural outfit that completed their application and received the tax credits. Montana's number one source of revenue comes from agriculture, yet there has been only one success story in over forty years.

Benjamin Flowers provided some of the issues in rural America and the field of historic preservation: "An often-overlooked aspect of historic preservation is the movement for the preservation or conservation of rural areas. Unlike preservation in an urban setting, rural conservation is more focused on vernacular architecture, on environmental considerations, and on retention of the agricultural economy."²⁹²

Flowers goes on to describe the problems facing the agricultural community, which is small in terms of the number of people but one of the largest contributors to

²⁹⁰ Casey Leins. "These States Are the Most Dependent on the Federal Government." *U.S. News and World Report*, February 12, 2019. <https://www.usnews.com/news/best-states/articles/2019-02-12/these-states-depend-the-most-on-the-federal-government>. Overall dependency on federal funding begins with number one New Mexico, Kentucky, and four states in the deep south, followed by Arizona, Alaska, Montana edging out Louisiana at number 10. Ironically Louisiana also gives the most corporate subsidy to industry so they could relocate or stay in-state. Therefore, the state and its residents are the tenth most dependent on the federal subsidies and yet the state of Louisiana subsidizes corporate residents with over \$2000 per taxpayer or approximately 10% of the per capita income.

²⁹¹ Montana State Historic Preservation Officer, P. Brown, April 23, 2019, email to author.

²⁹² Benjamin Flowers, "Historic Preservation." In *Encyclopedia of American Studies*. Baltimore, MD: Johns Hopkins University Press, 2018. <http://eas-ref.press.jhu.edu/view?aid=8> (

state revenues: “rural communities have found themselves squeezed by land development on one side and the increasing corporatization of the farming industry on the other.”²⁹³ In the span of one generation, thousands of acres of arable land have changed to other uses and mostly suburban sprawl; therefore, Flowers added, “Preservation requires addressing the economic factors that negatively affect small farmers and small rural communities, including the rates of rural gentrification, as well as the ecological value of particular land uses.”

Unfortunately, rural economic disinvestment has become a public issue that receives much less in subsidized solutions, and in a scattershot manner that most farm families take advantage of whatever they can when planning their crops or livestock acquisitions, fuel tax discounts, and the futures commodity market as an exit strategy rather than taking harvests and stock to sales barns and millers. Even their tax assessments and write off when filing their farm income tax returns are skewed in their favor somewhat because of the financial risks they take in farming. None of the property owners in town or country that I interviewed knew about their opportunity to take a tax credit for rehab of their historic structures, and the public records bear that out. Farm families are always aware of the weather, the market, immunizations, and their welfare.

As a result, having a second income for many is necessary to obtain health insurance and stay on the land; most are eligible to receive favorable local and federal tax treatments. However, as it has always been, farming is a viable but risky way of life. As

²⁹³ Benjamin Flowers, “Historic Preservation.” In *Encyclopedia of American Studies*. Baltimore, MD: Johns Hopkins University Press, 2018. <http://eas-ref.press.jhu.edu/view?aid=8> (

in most subsistence occupations, dryland farming and raising stock in the arid Northern Plains is not a wealth producer. The only way for a quick profit is selling the real estate, which is arable and could remain a dependable vital source for the international food supply. Unfortunately, startup young farmers cannot afford the cost of inflated real estate prices for arable land, and watered land is out of their reach because it sells as amenity seekers fishing camps or hobby ranches.

Therefore, needing a tax shelter for surplus income may not even come into the equation with family farmers facing the vicissitudes of the marketplace and succession planning. They do not consider the risk of the HTC as lost benefits for most farm families. However, it may be an opportunity for syndicating the tax shelters through cooperatives that can help families survive as owner-operators and not be forced to sell their inheritance.

The settlers who did not arrive early to claim the best arable land may have had a rugged dry land to bust for cultivation more than a century and a half ago. Remaining an isolated individualist was usually unsuccessful in sustaining homesteads²⁹⁴ during the worst of extremes brought on by weather or market conditions. A few early 'Rushers' claims proved profitable, but most gold rush seekers or dry land farmers met less lucrative fates. Those disappointed masses led migrants to populate Western towns and cities, become tenant farmers and farm laborers or work for others in the mines.

²⁹⁴ Mary Murphy, *Hope in Hard Times: New Deal Photographs of Montana, 1936-1942* (Helena, Mont: Montana Historical Society Press, 2003).. Uses New Deal photography from the Depression for a closer look at struggling homesteaders in Sheridan County, MT

The USDA data reveals that of the 5.7m farms, only 3.7m in 1900 were owner-operated.²⁹⁵ The USDA reports that only 2m farms were operating in 2018, and 98% are still family-run. Some of the descendant owner-operators have married well and consolidated the ancestral farms of both families. When they could rehab the old outfits' barns, and sheds, or other structures like the family farmhouse, these descendants have chosen to use the HTCs. However, studies have shown that most next-generation farm heirs since WW II chose to live in new mobile homes and use steel siding for their grandparents' old barns, thus the opposite of rehab efforts of the old historic agricultural structures. Thus, they continued to ignore the benefits from HTCs for their income-producing ensemble of historic agricultural structures that have survived a century of use on the family farm.²⁹⁶

Back in 1900, 21m farm people needed to work as tenant farmers or wage laborers on the remaining 2m farms without owner-operators. The masses of people lacked a 'place' to land permanently and mostly migrated to the factories and mining industry. This farming labor surplus added to the urban unrest when jobs shrank. None of the western farm wage laborers were better off than those in city factories, and eventually, many drifted to larger cities to compete for low-wage factory jobs leaving only the oldest firstborn son's family to inherit the farm. This reality defeated the argument of the safety valve of free land when passing the Homestead Act. The free land concept claimed it would relieve eastern cities' superabundance of labor if only the

²⁹⁵ Fred A. Shannon, "A POST MORTEM ON THE LABOR-SAFETY VALVE THEORY," *Agricultural History* XIX (January 1945): 31-37..

²⁹⁶ Ibid. This lack of safety valve has led to explosive protests and civil unrest periodically, with the Great Depression as its zenith. Its effect continues in the political debates today regarding undocumented migrant workers.

easterners would go west. Instead, millions stayed put on the coast and did not try homesteading and continued to toil in city factories, or worse. The safety valve never materialized as theorized, relegating it to yet another neoliberal flawed political-economic theory.

Even the transcontinental railroad publicity sought European farmers to immigrate to take up the offers of free land in the USA. Special train cars were used to move entire households out west and directly to the farmland that railroad land agents were eager to sell to newcomers. The railroad checkboard strategy had their agents file homestead claims on those parcels adjacent to the land they received as a subsidy from the federal government. The railroad sent agents overseas to, say, Scandinavia to persuade a mass exodus from Europe to farms along the new railroad routes built through the Northern Plains to the West Coast. The indigenous and their historic symbiotic herds of bison were removed from the Great Plains, and Northern Rockies and the US Army had built posts since the 1870s to protect the frontiers.

Not relieving the urban labor surplus resulted in explosive strikes during depressed economic cycles of the 1890s (i.e., the Homestead Strike, the violence in Coeur d'Alene mining camps, Haymarket, Pullman, and related railroad strikes). The destruction of private property caused the US attorney general (who was still on retainer to the railroads while on Pres. Cleveland's cabinet), call out the military and private Pinkerton security into action to bust the unionists' strike solidarity. Many died or were put out of work.

In the closing decade of the nineteenth century, the violent competition between labor and capital produced less than ideal conditions, which led to progressive reforms. In contrast, those who cooperated in order to survive the harsh arid conditions or the Great Depression were organized, such church led colonies who homesteaded the prairie lands. Those strategies made them able to sustain through economic panics and hard times due to natural disasters and waning markets for crops or livestock. Moreover, families helped other family units stay on the land and develop resiliency as only civil society can do without much help from the territorial or federal government²⁹⁷ who had historically sided with bankers, the Trusts, railroaders, and industrialists.

The Gilded Age and the limited reforms by the Progressives left the next century on an uncertain course destined for more disasters, such as the Great War, worldwide epidemic. The Great Depression and the displacement of the Dirty Thirties ended what the Homestead Act set in motion for masses of farm families who could not overcome the Dust Bowls resulting from unsustainable soil and ecosystem degradation. The long grip of neoliberalism today relies on those who claim the cooptation of those who claim to support the common welfare of the masses as their elected representatives. They are rendered ineffectual due to the cooptation by powerful lobbyists whose election campaign funding arrangements supported by neoliberal global economic dynamics outspends individual voters and divides the populace into competing sectors rather than cooperative members of civil society. Pitting those dependent on the agri-economy and

²⁹⁷ Murphy, *Hope in Hard Times*. Murphy, Mary. *Hope in Hard Times: New Deal Photographs of Montana, 1936-1942*. Helena, Mont: Montana Historical Society Press, 2003.

extractive industries against those who seek to heal the environmental degradation has been a common ploy. The shrinking government's role in reforming and mitigating excesses adopted during the progressive era is another ploy to take power away from the many to enrich the few.

Some renowned cultural and scholarly individuals present observations as they counter the often-heard 'rugged individual' myth of the Old West asserted.²⁹⁸ Since the false claims of the promised land, the machine in the garden, or the virgin land in the closing frontier of the West led to doubts that American Studies has found generative of a large corpus of scholarly work, I now understand Ivan Doig's comparisons of Eastern and Western displaced people. Ivan Doig²⁹⁹ makes more sense to me now; he equated those old, ruined homesteads dotting the plains and ubiquitously named after their long-gone homesteaders. Hearing driving directions in a historic landscape given by local ranchers may sound rooted in the lay of the land. Unfamiliar with the countryside, a UPS delivery truck driver will invariably have to follow Ranchers' cognitive maps of personal cultural landscape landmarks. He might say, "Go past the old Peterson Place before turning uphill to get to my outfit." Not realizing a novice driver may never have heard of the Peterson's, who vacated the homestead a century before and their place was a collapsed moldering ruin barely rising above the plains, for instance, The driver, glad for ubiquitous GPS maps even in rural areas will probably ignore the Rancher's directions. In doing so,

²⁹⁸ Margaret Mead, *And Keep Your Powder Dry: An Anthropologist Looks at America* (New York: Morrow, 1942)... Margaret Mead and others who have studied anthropology see the essential interdependence supported by associations to successfully negotiate living in a 'no one is an island' counter argument.

²⁹⁹ *This House of Sky* (Newport Beach, CA: Books On Tape, 1987).

one misses the going and only wants to get there. Stegner wrote that the Great Plains abhors anything left standing as it conspires to bring it down to join the vast terreplein.

In *This House of Sky* musing by Ivan Doig, the old homesteads were just so many “landing spots” for millions of migrants, just as the “tenements were to the newly arrived immigrants” in New York City. He should know since his dad lived that life of hired help, and I too can corroborate that since my family was first born Americans of immigrants to the tenements of the Lower East Side, there was no permanency implied about these places.



Figure 62 Ivan Doig's Grandmother's Home in Ringling, MT

I remain optimistic that the 45,000 successful rehabs, aided by HTC's will become more visible, like the memes on social media that go viral. It seems that the typical rugged individual trope and neoliberalism dynamics are not congruent with tax shelter-seeking behaviors. When looking at the results of the HTC utilization, there must be other factors involved. Under

Clinton's administration, the former Secretary of Labor gave a lecture in 2017 in which he defined what the Boomer generation polls indicate today. In the sixties, 67% of the people in a Gallup poll felt positively toward public service, and the government could be trusted compared to today's low of 20% +. Distrust replaced the common good that most people were raised to believe was the operative ideals of our democracy. Robert Reich remained optimistic because lately, he has seen the rebirth of the much-needed grassroots democratic actions.³⁰⁰ In another lecture, Reich calls the myth of the rugged individual 'rubbish,' thus joining many notables who have shared this opinion.³⁰¹

Wuerthner, Matteson, and Tompkins, editors of *Welfare Ranching, The Subsidized Destruction of the American West*, claim "Taxpayers may be shocked to realize how much the myth of Westerners' rugged individualism is supported by the general public, in fact, 300 million acres of public land grazed by livestock in the West equal the area of three Californias."³⁰²

The evidence of the past century and a half shows that this country's 'Manifest Destiny' was produced by expansionism on steroids. "We abuse land because we see it as a commodity belonging to us. When we see land as a community to which we belong, we may begin to use it with love and respect."³⁰³ Aldo Leopold contributed to a new ethos, a land ethic, as Wallace

³⁰⁰ Robert B. Reich, *Beyond Outrage: What Has Gone Wrong with Our Economy and Our Democracy, and How to Fix It* (New York: Vintage Books, 2012).. Grassroot efforts in the UK of young people are now outnumbering the votes of the older generation.

³⁰¹ Reich is joined by Margaret Mead, anthropologist who decries the claims of rugged individuals. Reich says it is impossible to pull oneself up by your bootstraps because it defies physics and the law of gravity and is falsifiable.

____ Russell Rowland, *Fifty-Six Counties: A Montana Journey*, 2016. Rowland writes of the many counties where encounter the regressive attitude about making it owns own and tells about Montana Composer Philip Aaberg who returned home to the High Line and shared his opinions dismissing the rugged individual myths. Voicing their firm opinions that there is no basis for the myth they concur that instead no man is an island prevails.

³⁰² George Wuerthner, Mollie Matteson, and Douglas R. Tompkins, *Welfare Ranching, The Subsidized Destruction of the American West*, Edited (Washington: Island Press, 2002)..

³⁰³ Aldo Leopold, *A Sand County Almanac and Sketches Here and There* (New York usw: OUP, 1972).

Stegner did, and was called the dean of western writers. His collaboration with his son resulted in his last nonfiction book about those cherished small towns he enjoyed many road trips. His earlier award-winning nonfiction book, *Beyond the Hundredth Meridian*, is a seminal work in cultural geography.³⁰⁴ The authors shared their opinions about the old ideas of dominion over wilderness or conservation for multiple uses being “replaced with a humbler role as one of many citizens of a living community.”

Many key informants shared their conjectural hypotheses with me on those occasions when I could apply REAP. Using oral interviews and other observations to gather more data enhanced the published data of past behaviors by locals in preservation activities. For instance, I could triangulate on a particular key informant’s conjectural hypothesis. Then, I would follow their leads to gather more observations and expand my published dataset for constant comparisons following the new directions of the offered theory to test if it can cause the lag in utilizing HTC.

Part II.4. Feedback from Key Informants

Despite the density of professionals and their access to continuing education in metropolitan areas or university towns, the number of HTC projects has been sub-par in the rural Western states. Some conjectural hypotheses made by key informants about the intransigence to participate in the HTC involved many interrelated factors. Perhaps, as we have seen in the

³⁰⁴ Wallace Stegner, Eliot Porter et al., *American Places*, 1st ed (New York: Dutton, 1981).

____ Wallace Stegner, *Wolf Willow: A History, a Story, and a Memory of the Last Plains Frontier*, Penguin Twentieth-Century Classics (New York: Penguin Books, 2000).

distribution of higher education NCPE members, there may be something to do with a local gap in HP course offerings.

However, if taken together by an aware progressive developer, those tax credits could have been worth equal to half of their rehab costs when used for affordable housing under the Low-Income HTC program. Many developers amenable to building affordable housing have joined efforts with these government programs and others for disadvantaged census tracts to net more tax subsidies from the New Market Tax Credits or Solar Energy, but little to none in Montana. These overlays of government programs have been the only way to build affordably since Richard Nixon eliminated federal government direct construction support of low- and moderate-income family apartments.

Forty-five years later, the last buildings under those HUD programs are close to being historic. The false optimism of neoliberal economies that future reliance on private sector investments would fill the need for affordable housing has widened the gap further due to the intransigence toward government programs.³⁰⁵ The favorite slogan in the neoliberalist political campaigns was the false claim for a ‘trickle down’ economy when the rich get richer. Unfortunately, everyone does not see an equal rise in their well-being under those economic fantasies. Despite this apparent false promise of noblesse oblige, and in the face of the pandemic impact on private residential rentals, the Montana legislature has done away with the

³⁰⁵ Erica Avrami, ed., *Preservation and Social Inclusion*, Issues in Preservation Policy 2 (New York: Columbia Books on Architecture and the City, 2020).. See the chapter, Connecting Historic Preservation and Affordable Housing, by Caroline S. Cheong. Introduced by Avrami: “In examining the historical and discursive connections between preservation and affordable housing, Caroline S. Cheong likewise finds that the intersectional history is rife with conflicting narratives and research. Preservation asserts its positive role in simultaneously improving property values and protecting affordability, with evidence often tailored in response to particular criticisms of and challenges to the status quo. Greater accountability on the part of preservation and more unbiased research into the politics of the field’s past is needed to identify the barriers to and opportunities for such shared agendas and policy reform”.

inclusionary zoning programs altogether, thereby shrinking government size and social programs for low-income housing prospects.

Gone are the City Beautiful Movement days that enabled cultural institutions such as the Carnegie Libraries gifts to progressive communities. The civil sector supports many disaster relief efforts and is restoring the destroyed Notre Dame in Paris, for instance, at an estimated \$4B. Nevertheless, according to a former CEO of a homeless housing program, the community would rather see the poor pull themselves up by their bootstraps before solving the housing shortage.

Two decades have gone by since the city government called for impact fees to help subsidize affordable housing in the fastest-growing micropolitan area around Bozeman. If there is not enough affordable housing due to the developers' intransigency, there needs to be a more focused effort to educate and incentivize those who could make a difference. A pent-up desire and some protests by the citizenry have occurred by a more aware segment of local society.³⁰⁶

There could be a concerted effort to overcome obstacles and make a substantial dent in the housing shortage for many young families. Unfortunately, rather than cooperatively overcoming the marketplace and developers' intransigence that is a sign of the neoliberalist strategies carried out by individuals, the gap grows between supply and demand and ultimately equity in the housing market. Building associations, real estate industry lobbyists, local, state, and federal bureaucracies engaged in the same old zero-sum game instead of the more vital resilient community health strategies where everyone benefits.

³⁰⁶ The disenfranchisement, caused by a lack of affordable housing and the low prevailing wage, has been echoed by all major employers including the university housing as the private rental market and homeownership exceeds what salaries can afford. Bozeman Daily Chronicle, May 23, 2021.

A retiree explained that in a career of doing preservation work, none of the clients were interested after being told of the HTC. One memorable client even refused both the tax credits and preservation grant worth over 100,000, and it came without IRS tax review. They were said to have a “fear of government oversight” and did not like restrictions on their choices of what can be displayed.

At the outset, the calculations for HTC require using a property’s depreciable tax basis, which requires a substantial ³⁰⁷ rehab expense equal to or greater than the basis. That equation makes it difficult if the building basis is high compared to the cost of the land that is not part of the calculations. The HTC prescribes what the list of allowable building systems will earn tax credits that is generous and can be found on the list of online webpages in Appendix C. ³⁰⁸

In 2018, the National Trust offered several suggestions for improving the HTC program utilization in smaller and rural rehab projects. Most states have heeded these suggestions thanks to lobbying by Preservation Action and the Trust. Once a state passes the tax credit incentive, it can be removed or may have a sunset clause, and vigilance on the part of the preservation lobbyists is constant over all fifty legislative agendas plus DC and the territories and the federal committees.

³⁰⁷. Gleye, “With Heritage So Fragile: A Critique of the Tax Credit Program for Historic Building Rehabilitation.” Dr. Paul Gleye lamented the requirement for substantial rehab when the first directive to do the least amount of change and harm to the extant historic fabric of the NR listed property.

³⁰⁸ The list of systems allowed for rehab are guided by several illustrated guidelines for helping achieve compliance with the Secretary of the Interior www.nps.gov/history

<u>Colorado</u>	2018	25% for \$2M QRE; 20% for \$2M+ QRE	30% disasters; 35% in rural communities; 20% homeowners	25% of adjusted basis; in 2020, flat \$20,000	\$10M	\$1M	Yes	Yes
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Figure 63. Colorado Tax Credit Increase

Colorado increased its credits from 25% to 35% for certain communities with populations below 50,000 sourced from sin taxes in the Casino Tax of 1991, where 28% goes to the State Historical Fund. The SHPO in Wyoming cited that as a problem for utilization of the federal HTC that the state legislature could resolve but have Washington and Oregon added their state historic credits after the 2018 publication of the NTHP report for these other states. Nevada, Idaho, and Wyoming do not offer state tax incentives for historic rehab, choosing not to do what 30+ other states have done. Wyoming Lottery goes to the State Treasury for distribution to towns and counties. Although they do not have a special fund for preservation or a state tax credit for rehab, they fund studies with state money to get a project's nomination applications moving along. Idaho uses its lottery, since 1989, for public schools and a higher education building fund. This could be used for historic campus buildings, presumably. Montana preservationists fought to have the HTCs 25% reinstated in the 2021 legislature and succeeded where other tax breaks were cut.

My research was based on my being able to synthesize the many contributions of conjectural theories from others. Using digital means of communication, especially during the 2020 pandemic closing of public facilities and libraries, I relied primarily on their expert opinions via email responses to survey to develop and test the theories using the multi-factor

offered by the key informants. The evidence of a brief surge of online views is graphed for several events posted to a blog I created in addition to the website portal for enrolling through Canvas to begin working online in the Learning Places course. Whenever there was an annual meeting of the Montana chapter of the AIA; or the publication of an article about past homesteaders like the Trapper's Cabin and related tours by the HPBGC; the invites to the Survey Monkey and the One Room Schoolhouse course via D2, there were correlated peaks of online activity and messaging as shown in the charts below:



Figure 64. Montana AIA Meeting Slide

Turning the enrollees' final reports into a humanities archive will enable its growth with Learning Places as the same portal for its alumni. The counting of archived past projects' webpages visits is for future analysis. Those hits can accumulate as valuable quantitative data tracked by the metrics of followers as done by social media platforms. A legacy started by the participants' contribution can proliferate with each view by others who will learn by example.

With the advent of social media platforms, users can be informed by others who can track their likes and dislikes, as in thumbs up or down and emojis. Thus, a legacy started by the participants' contribution can proliferate with each view by others who will learn by example. Their feedback has led to some of the following recommendations.

Part III Recommendations

Part III contains three recommendations for the closing of Chapter Six. The three focus attention on the three problem areas hindering historic preservation activity while informing about the three research questions. The first is neoliberalism's economic dynamics being blunted and counteracted by the efforts needing more agency and grassroots know-how to manage the authorities; and last but not least, education of a more aware civil society will enable anyone to play a part in being the change they want to see in the world.

Part III.1 Recommendation: to Impact Neoliberalism

Rural cooperatives versus competitive marketplaces is an ongoing third way for rural communities to prevent the flight from their small towns to the cities. It is a way of coming home again and can be aided by volunteers from their hometowns who enroll in the training offered by Learning Places. Using methods of facilitating vision quests and writing mission statements for

community activism and later strategic planning can be enhanced by the Appreciative or Asset-based inquiry.³⁰⁹ Rather than come from a needy community that is weak and lacking, without its assets and strengths, the facilitator who volunteers through Learning Places can use the “cutting edge of thinking in change management.”

Part III.1.a. Organizations: Development from social movements has taken developmental steps toward their viability. They do not seek profits in financial terms but in the amounts of engaged many people who join efforts towards their common ground, usually around social issues.

“What sociologists see as the end product of a developmental process (in social movements), political scientists see as the beginning,”³¹⁰ wrote Jo Freeman. Social movements like the nascent historic preservation one in the early sixties were eventually co-opted and structured by the government and establishment nonprofit groups that were extant at the nascent phase. “Spontaneity and structure are the most important elements”³¹¹ to a social movement that has matured from the initial collective behaviors, such as demonstrations and picket lines. The result of a maturing movement can become “a culture, social organization and new scheme of life.”³¹²

³⁰⁹ Lachapelle, Austin, and Clark, “*2010 Community Strategic Visioning as a Method to Appreciative Inquiry (AI) and other asset-based approaches are at the cutting edge of thinking in change management. It is a new and decisive direction. These approaches change our language and theories of organizations—organizational development—by looking at what works in an organization and what a group has, rather than what it lacks.*”

³¹⁰ Jo Freeman, ed., *Social Movements of the Sixties and Seventies* (New York: Longman, 1983).

³¹¹ Ibid. <https://www.jofreeman.com/books/waves.htm>

³¹² Ibid

Some nascent movements that acquire an organizational life to function within the existing political system have been well studied. For instance, the earliest observers of the American political process perceived these organized groups as the “fundamental components of American civil society.” With urban renewal and the major defense build-up after World War II wreaking havoc on older neighborhoods and surrounding estates in the suburban and exurban hinterlands, many diverse groups banded together to form a social movement akin to the century-old conservation ethic of Roosevelt, Pinchot, and Burroughs. The federally funded bulldozing effects on inner cities and the natural ecosystems were an unwelcome change agent that rallied diverse peoples into action who usually did not exhibit such social behaviors as civil disobedience, walking picket lines, and demanding redress from the governments at all levels.

“The creation of the massive interstate and defense highway system, said to be the largest public work since the building of the pyramids, was largely an Eisenhower era response to the Cold War.” This created a sense of urgency nationwide and a ‘clarion call’ according to Stipe.³¹³ However, “when the penumbra of spontaneous behavior has contracted to no more than the core organization or has not yet developed, there is also no movement.”³¹⁴ A movement needs both organization and spontaneity to remain viable. Simon,³¹⁵ as found in the textbook by Worth.³¹⁶

Part III.I.b. Reusing Rural Town Buildings and Historic Agricultural Structures. Some have written about a new form of homecoming that Wendell Berry³¹⁷ offered in his lectures. You

³¹³ Robert E. Stipe, *A Richer Heritage Historic Preservation in the Twenty-First Century*. Chapel Hill: University of North Carolina Press, 2003. p.10

³¹⁴ Jo Freeman, Jo Introduction, p. 2 <https://www.jofreeman.com/books/waves.htm>

³¹⁵ Simon, c 2001

³¹⁶ Michael J. Worth, *Nonprofit Management: Principles and Practice*, Third edition (Los Angeles: SAGE, 2014)..

³¹⁷ Wendell Berry, *The Way of Ignorance: And Other Essays*. (New York: Counterpoint, 2006), <http://www.myilibrary.com?id=246957>. <http://www.myilibrary.com?id=246957>.

can come home again to small-town America, and a revitalized Main Street, supported by programs like the spinoff from the National Trust called Barn Again and the Survey for Montana's One-Room Schoolhouses. Saving old schools for adaptive use has made sense for a couple of decades. A Montana example of sharing comes from the Musselshell Rural Investing Cooperative located in Roundup, Montana. Community members have come together to invest in the Roundup School, which is being developed into a multi-use housing and retail/business facility. Rural Investing Cooperatives have huge potential in Montana.³¹⁸

In 2018, the Main Street Employee Ownership Act³¹⁹ was passed through Congress, which focused on improving access to capital and technical assistance to transition small businesses to employee ownership and save thousands of companies and jobs.³²⁰

Part III. 2. Recommendation Two: More Agency for the Public with E-Democracy (RQ1)

Architects have formed associations for over 150 years. The United Kingdom has the Royal Institute or RIBA, and the USA has the American Institute. The UK requirements for annual license renewal continuing education credits are more rigorous than the 'United States' AIA minimum. A Chartered Member is the equivalent of a licensed or registered architect after passing a generalist architectural examination and work experience in the UK.

Continuing education for the 40,000 involved in RIBA, the Royal Institute of British Architects has mandatory requirements and electives totaling 35 hours³²¹ compared to the most

³¹⁸ Montana Cooperative Development Center <https://www.mcdc.coop/focus-areas/>

³¹⁹ Ibid. <https://www.mcdc.coop/focus-areas/>

³²⁰ www.nps.gov

³²¹ www.nps.gov

states in the United States and the AIA where 12 or 18 are mandatory or called HSW. The mandatory in the UK is taken in ten subject areas for two hours every year. For example, topic 9 covers conservation and heritage subjects broken into ten subheadings and an average of five specific subject matter. So, in the course of a decade, a chartered member would be expected to have twenty hours more specialized continuing education in conservation and heritage drawn from the fifty subject suggestions found in the list below.

There are eighteen required credits in the United States and in Montana, and in most states, twelve must be health safety and welfare, and six can be miscellaneous learning units. In the UK, there is a requirement for fifteen hours of elective study and twenty hours mandatory. Many states resisted the requirement to make continuing education mandatory at all. Montana began its requirement as late as 2013. If an architect is licensed and not a member of the AIA, their annual requirement is 40% less rigorous than the UK's RIBA member and 33% less than a US AIA member. None of the US requirements make mandatory the subjects that the UK found to be essential, including conservation and heritage.³²²

Part III 2.a. The Newer Deal a CCCC is Needed. For those who can foresee (4C) their role in making the changes in the world comes the Cultural Conservation Corps Cooperative. Cooperatives owned by employees and cooperator members form a resilient community association for the sake of homecoming and Saving Cultural Resources by Learning Places. The

³²² Continuing Education Costs: 35 hours per year equals 45 minutes per week: the 20-hour core requirement within RIBA cost for 1000. In the USA, the AIA cost is \$25, at AIA U, and is $25 \times 18 = \$450$ per annum + membership = \$900 that 35 hours equates to only 20 minutes per week. FN2: the ten major subject areas per year include: Topic 1 Architecture for social purpose; Topic 2 Health, safety, and wellbeing; Topic 3 Business, clients and services; Topic 4 Legal, regulatory and statutory compliance; Topic 5 Procurement and contracts; Topic 6 Sustainable architecture; Topic 7 Inclusive environments; Topic 8 Places, planning, and communities; Topic 9 Building conservation and heritage Topic 10 Design, construction, and technology.

size of this historic preservation incentive program and its relation to the total building construction industry in the United States reveals the size of the ballpark for a context. The construction industry is annually a trillion dollars or 6% of the USA's GDP. The cumulative HTC program has amassed one billion rehab dollars in some years and over 100 billion dollars in over forty years. That comes to 0.001 of the total construction annually. There are now estimated to be 115,000 architects playing their part in the one trillion-dollar construction industry. That amounts to 115 architects for preservation projects if the ratio of 0.001 is applied crudely to this analysis. Again, another crude distribution would be two architects per fifty states, and 20 of the 20,000 architects who attend an annual AIA conference might be expected to be engaged in the HTC programs as a part of the preservation field, again using the 0.001 ratios as suggested by the HTC annual share of the trillion-dollar construction industry annual total.

Part III.3. Community of Learners Online and a More Aware Civil Society, it is the Heart of the Matter (RQ2):

The humanities and social sciences are not merely elective, nor are they elite or elitist. They go beyond the immediate and instrumental to help us understand the past and the future. They are critical to a democratic society and they require our support.³²³

These inspired words came from a select group of creative Americans whose suggestions helped form the last recommendation for Chapter Six based on *The Heart of the Matter* report. There are thirteen action items for making a more aware civil society in its three-part recommendations. Learning Places has comparable suggestions embedded in the program and its

³²³ Commission on the Humanities and Social Sciences and American Academy of Arts and Sciences, *The Heart of the Matter*, 2013, http://humanitiescommission.org/_pdf/hss_report.pdf.

six modules of the syllabus. If followed, those enrolling could contribute to the changes they want to see in the world. See the corresponding Learning Places activity in the table below:

Table 43. Comparison of the Heart of Matter and the Learning Places Proposals

	The Heart of the Matter List³²⁴	Saving Cultural Resources by Learning Places
1.	“Educate Americans in the knowledge, skills, and understanding they will need to thrive in a twenty-first-century democracy.”	“When we engage with these subjects, we learn not only what but how and why.” The IDEALS technics provide the HOW, the HP philosophy the WHY. The learners choose WHAT.
2.	“Invest in the preparation of citizens. Expand collaborative partnerships and use new technologies to ensure that quality education materials reach all students, especially among the disadvantaged. ...expanding the number of high-quality digital resources available.”	“Increase access to online resources, including teaching materials.” Learning Places is free and accessible to all. Module Five shows how learners can be leaders and teach others what they have learned from elders.
3.	“Engage the public ...in humanities and social science activities...cultural, historical, and ethical expertise and empirical analysis.”	“Public-private partnerships support a strong networkthe ability to put a received idea to a new purpose...capacity to share and build ideas with others” Learning Places creates space digitally for the community of learners to thrive and apply their learning to help others.
4.	“Equip the nation for leadership in an interconnected world...Encourage cities and states...organizations like the Corporation for National and Community Service (CNCS) to develop a “Culture Corps.”	“Develop a Culture Corps to transmit humanistic and social scientific expertise from one generation to the next.” Learning Places passes on the narratives from the past through the service learners to the future. It can become an online recruiting and retention instrument of the CNCS for a new CCC Cooperative.

³²⁴ Ibid. The Heart of the Matter https://www.humanitiescommission.org/pdf/hss_executivesummary.pdf

Table 43 Continued

	The Heart of the Matter List³²⁵	Saving Cultural Resources by Learning Places
5.	“...libraries and museums...cultural institutions serve as multipurpose community-gathering places. Moreover, public art, architecture projects, and discussion groups strengthen communities and enhance local economies.”	“By offering invaluable opportunities for continuing, lifelong education, the humanities, and social sciences... further the democratic ideal of an inclusive, national culture.” Learning Places welcomes all enrollees without exception and can be repeated with re-enrollment for more growth. “
6.	“By matching interested adults with schools, community centers, and other organizations...historic sites, would both promote cultural literacy and build new relationships across existing socio-economic and generational divides.” ³²⁶	Learning Places embraces Service-Learning precepts of “experiential education in which students engage in activities that address human and community needs together with structured opportunities for reflection designed to achieve desired learning outcomes.” ³²⁷ ”
7.	The digital world offers vast new possibilities for delivering instruction and facilitating research, ...family trees can be traced; classic texts and manuscripts are made accessible.” ³²⁸	“Making the past and future possibilities come alive to students of all ages: historic buildings reconstructed...” Learning Places provides the techniques for competency building and the preservation philosophy and law for learners.

Like the one formed by FDR during the Great Depression, a corps were civilians working on conservation projects; thus, the CCC. It was revived as the NCCC and is now under the AmeriCorps within the CNCS. My acronym for the Cultural Conservation Corps Cooperative recommendation adds cultural as the antecedent and cooperative at the end. The Cooperative concept allows for memberships and investments by others to help grow the organization. Using the military term for a small group, as in corps, has had a good history. I recall the Corps of

³²⁵ Commission on the Humanities and Social Sciences and American Academy of Arts and Sciences, *The Heart of the Matter*.

³²⁶ Ibid. The Heart of the Matter https://www.humanitiescommission.org/pdf/hss_executivesummary.pdf

³²⁷ Barbara Jacoby, ed., *Service-Learning in Higher Education: Concepts and Practices* 1st ed, The Jossey-Bass Higher and Adult Education Series (San Francisco: Jossey-Bass Publishers, 1996).

³²⁸ How-To books can help out: <http://digitalcommons.unl.edu/cgi/viewcontent.cgi?article=1198=historyfacpub>

Discovery formed in 1803 and its well-known trek across Montana to the Pacific and back to St. Louis led by Lewis and Clark with Sacajawea as a guide. Although a military term, Medical and Signal Corps, for civilians, Corps, is repurposed in the Thirties for the Civilian Conservation Corps, JFK's Peace Corps, and the AmeriCorps in 1993 under Clinton, who included the term Corps for the new NCCC volunteers.³²⁹

A new program called the Cultural Conservation Corps Cooperative (CCCC) could be nicknamed 4C, sounding like foresee and typifies those who volunteer as a corps that can foresee the future although no one believes it.

As a program proposal in line with the Culture Corps envisioned by *The Heart of the Matter*, it would also be supported under the Corporation for National and Community Service (CNCS) to adopt and merge with their programs such as Senior Corps and AmeriCorps NCCC. Through their existing networks, it can augment what is in place for community services and natural resources. Without much more organizational building, it could start serving those existing partner sites, nonprofits, willing states who can fund the services of the adult leaders as they direct the volunteer young and young at heart service learners for saving cultural resources. A culture corps would strengthen civic life by offering instruction and guidance for deep, lasting commitments to community revitalization in the most disadvantaged segments of the United States.³³⁰ The AmeriCorps already has a FEMA partnership, and many state park systems enjoy the services of the NCCC in their conservation workload.³³¹

³²⁹ The CNCS is the umbrella federal agency with 5 million volunteers. It covers several programs, including, Senior Corps, AmeriCorps is a voluntary civil society program for adults in public service work with a goal of "helping others and meeting critical needs in the community. They have 244,000 volunteers to draw from per annum. <https://americorps.gov/> One of the branches of AmeriCorps is the NCCC for youthful adults under 26 and modelled after the CCC from the pre-WW II conservation and Great Depression era initiatives of the FDR administration.

³³⁰ <http://www.americorps.gov/>; and http://www.cityyear.org/default_ektid22283.aspx.

³³¹ I supported a group in two parks in New Mexico when the AmeriCorps first began, and I fully appreciate how the communities can be uplifted by these volunteers.

How to get the Corps Going: private support, besides the support provided by the Corporation for National & Community Service and the state humanities councils, historic preservation offices, everyday citizens could play an even more meaningful role. For example, in presenting a case for the establishment of the NEH and its partner agency, the National Endowment for the Arts, Glenn Seaborg, then head of the Atomic Energy Commission and a member of the 1964 Commission on the Humanities, told a Senate committee:³³²

We cannot afford to drift physically, morally, or esthetically in a world in which the current moves so rapidly, perhaps toward an abyss. Science and technology are providing us with the means to travel swiftly. But what course do we take? This is the question that no computer can answer.³³³

That future, as Seaborg described, will be brought forth according to the Humanities Commission by,

No single person, no single institution, no single intellectual approach offers an answer—it can be discovered only through cooperation. Public programs and cultural institutions, connecting people of all ages and backgrounds, provide opportunities for contact, growth, and collaboration—the very essence of a civil society. They should be included among our highest educational priorities.³³⁴

Part III 3.a. Community of Learners Online Public Spaces: The last recommendation to myself and anyone else who follows up after completing the course is to develop more modules for Learning Places. There is room to learn more about standing up an online course as the flagship of a new nonprofit program. In the first evaluation of Learning Places as a new startup program, I used OCAT to find those weaknesses and strengths to help improve its viability and

³³² http://www.humanitiescommission.org/_pdf/hss_report.pdf

³³³ <http://www.neh.gov/about/history>
http://www.humanitiescommission.org/_pdf/hss_report.pdf

³³⁴ http://www.humanitiescommission.org/_pdf/hss_report.pdf

functionality. The problem addressed here is the functionality of the online course as the user experiences it. The new term that I learned from advisors at the Blackstone Launchpad on the MSU campus describes what I previously considered akin to surfing channels on the TV with your remote and just peeking in to see what would be an interesting way to spend a couple of hours watching a new movie. The Launchpad advisor called it by its hip new social media name: ‘Bouncing.’ The learners who find the link to the Learning Places portal enroll themselves by entering their email address through Canvas LMS, and I learn of their entry into the web space by instant text messaging. Sometimes before I could welcome them into the course with an email from the Canvas webpage, they ‘bounce.’

I liken this to those who start an application but never complete the HTC as another missed opportunity. Had they spent anything more than time, it might have felt like an opportunity cost to them. My lesson learned is that people cherish their time perhaps more so than they cherish those cultural resources in their midst needing their help. So, my recommendation to self is to treat the user in the way the user likes to be treated while online, not as I would like to be treated. A successful salesperson trainer told me that is what is truly meant by the Golden Rule. So first, find out how they would like to be treated, then do unto others that way. To do that, I have to keep up to date with the current and future trends in user experience design and implementation. Then, I have to explore Canvas more fully and push myself to invoke its more user-friendly, technologically aided functionalities.

All of this serves to remind future course designers, myself included, to emphasize the UX of online learning because it can aid and abet your course’s mission and success rate of keeping students in “their seats” or on their smartphones and participating while learning. The

user experiences (UX) are necessary as all other factors in assuring the learners' success. "User experience" breaks down into two parts for more study and improvement. First, I need to know more about the "*User*" while streamlining their way through the portal to be enrolled. I simply asked them to fill out a profile once they were inside, but very few did. By finding a way to do this, I will know more and more about where and perhaps why users are attracted in the first place to peek in on the webpage.

Secondly, the "*Experience*" depends on the philosophy I use to facilitate the way learners acquire knowledge: the amount of control that the student has over the content and nature of the learning activity. This could be presented in the form of select your preferences for learning style on the enrollment page. Those seeking more activity would be immediately greeted with an embedded video that stops to get their input before continuing onto the next action-laden moving scene. Others may want an assurance of no homework and want to surf through and come back later if they like the tour. As presented now, they must begin reading text, and after a full day of work doing just that, some may balk so that I could ask them right up front. There are timers to measure how quickly someone leaves through an online book they downloaded on kindle. It gives feedback, and I could use that metric to provide a minimalist view of the modules with lots of pictures and large type and many radio buttons to click for fast-forwarding or going back.

As many technical trainers I have known like to say about finding the correct answer to a complicated question, "it all depends." Which makes one want to know more about those factors that determine the eventual answers. Without knowing what parameters matter, a designer begins without a compass to create the design that ought to fulfill the client's desired function. In a recent dissertation on Frank Lloyd Wright by an accomplished architect and instructor reminds,

“Architecture must obey all sorts of rules, from the law of gravity and physics, building codes, and financial limitations to name a few.”³³⁵ Frank Lloyd Wright appreciated the force of gravity, for instance, and it helps architects realize the parameters in which they can be creative. His work was never a duplication of his previous creation, and he once told Hugh Downs on a rare television interview that his best project is the next one he will design because he still had many cards hidden up his sleeve like a poker dealer who could just shake a new ace out at will. Nevertheless, his reputation and penchant for novelty did not escape an essay by William Cronon, who summed up the designer’s need for a life of creative one-upmanship with himself that seemingly defied specific parameters.

However, in my pursuit of continuous improvement of the Learning Places online course, I have to find out its ultimate best practices to match expectations better. For instance, not using:

- traditional didactic or *expository learning* experiences,³³⁶ and
- “instead a learner chooses how much” *active learning*’ they desire, so the ‘student has control of what and how he or she learns.’ That was stated as my foundation to the course designed for adult service learners who want a hands-on experience, now I have to learn how to do just that.

Lastly,

³³⁵301 K. Dahlin, “The Aesthetics of Frank Lloyd Wright’s Organic Architecture: Hegel, Japanese Art, and Modernism,” 2018.

³³⁶ Barbara B. Means, Yukie Toyama, Robert Murphy, Marianne Bakia, Karla Jones, and et al. “Evaluation of Evidence-Based Practices in Online Learning A Meta-Analysis and Review of Online Learning Studies.” U.S. Department of Education Office of Planning, Evaluation, and Policy Development Policy and Program Studies Service: Center for Technology in Learning., n.d. <https://www2.ed.gov/rschstat/eval/tech/evidence-based-practices/finalreport.doc>.

- Stresses collaborative or *interactive learning* activity in which the nature of the learning content is emergent as learners interact with one another and with a teacher or other knowledge sources.

Comparing the differences between the short-time users of the course and those who completed the course for a certificate allowing the information of most visited webpages in the course, the content most likely visited, and what pages were never seen by even the most prolific online learner. A Table of those findings for an average enrollee is provided in Appendix E.

In Learning Places, an alternative final project was offered in lieu of the complete final report of rehab proposals to the cohort, community, and archive. Each service-learner enrolled is encouraged to create a Google Site of their own and use my example at

<https://sites.google.com/view/learning-places-canvas-home-1/home>.

That site now has the first graduate's most excellent webpage created for the chosen project, the Great Saltpetre Cave Ticket house in Kentucky. So that begins the archive that was envisioned and could grow with each cohort.

The underlying intention to making the UX a bit more graphical and less textual meant certain design decisions were necessary. That effort began as a suggestion by a consultant to online marketing for nonprofits,³³⁷ “architects need a pretty picture to look at it.” The closing illustrative graphic is the LP business card that welcomes recipients to enroll in the course. Looking at the bottom photo first and working up from there shows the iconic image for agricultural, transportation, education culminating at the cupola atop Montana Hall is the

³³⁷ Tim Lockie is a local certified Salesforce Rep. <https://nowitmatters.com>

pinnacle of the outreach by a land grant university.³³⁸ The authorizing Morrill Act offered every family a place for their sons and daughters to study Agriculture and Mechanics (engineering), and the graduates who intended to go back home to the farm with the newest lessons from expert faculty. The faculty was there to help homesteaders with science-based, think also engineering, services to improve the health and yield of farm animals and crops. Therefore, Montana State University's historic mission is presented in one card's branding design.

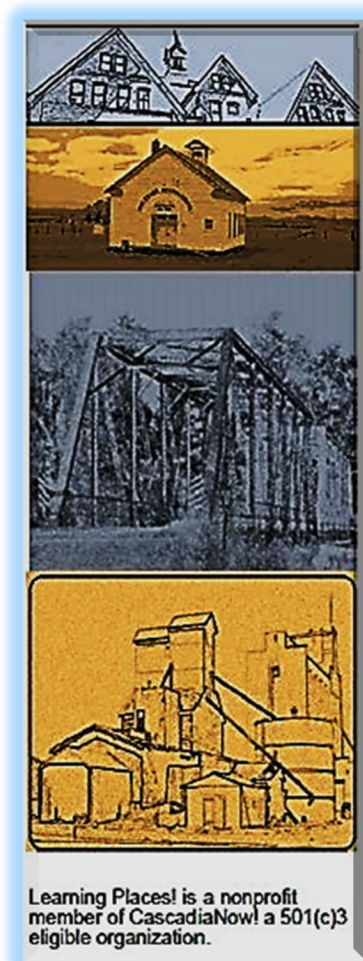


Figure 65. Learning Places Calling Card Icons

³³⁸ Rydell, *Democracy by Degrees*.

Little is known about the calling card icons; they all may become the photo record of vanishing heritage places, once treasures from the past lifeways, although they all became threatened recently because of advanced deterioration and demolition plans. These iconographic images dated back five generations of Montanans and were included to help volunteers from any way of life connect with the purpose of Learning Places. That purpose may seem trivial in the context and out of respect for the people whose traditional land the university currently uses. I especially extend this welcome to descendants of those with much longer-lasting lifeways here in the open commons of their ancestors who were indigenous to these Northern Plains twelve plus millennia ago.

I pose a question whenever someone is willing to accept the business card featured above. Then, speaking with anticipation and due gratefulness,³³⁹ I ask this leading question of the recipient: “Would you be willing to help save a favorite cultural resource by enrolling in the online course Learning Places?” Not everyone has a favorite historic property in mind when I ask, but everyone has a past, and most come from somewhere else. That stored memory is present in their minds as a place they could visit at will, even though it is far away and distant in time. The past, especially regarding ‘place,’ embeds itself in our memory for later recall. Some quickly avoid going on that journey to what has become a foreign country, as Lowenthal refers to the past. Some have lost their way back to their placemaking memory cells.³⁴⁰

³³⁹ Note: In the Appendices, there will be additional material presented regarding the snapshots of the course content, findings and results presented with more in-depth tabular data; final reports exemplars from the online course users; any other justifications and citations related to my recommendations, more in-depth opportunities for studying the tabular data for more research and methods.

³⁴⁰ Nobel prize winner John O’Keefe, an alum from my alma mater CCNY, found the “place cells” - located in the hippocampus and formed a map within the brain. He shared the prize for their discoveries of cells that constitute a positioning system in the brain.” (like a GPS memory file).

I offered the invitations as tickets to pass through the virtual portal to their past; however, most did not take that ride back home and did not give Learning Places a chance. When I sold actual tickets to the Gallatin Valley historical tours, there were usually a hundred of the five hundred that I could persuade to visit the docent-led stops on the self-driving maps. The physical presence of historic places proves Dr. Robert W. Rydell's assertion that the "past is proximate."³⁴¹ Tour-goers wanted to construct their knowledge of this nearby history actively. The online tickets to learn when rejected by the target audience took me out of my self-centeredness to remember how diverse the response of the architecture profession has been toward the historical places around them.

Architects may indeed be diverse in their inner preferences despite the uniformity of their race, gender as they are part of the dominant hegemonic majority in the profession for over a century and a half. Despite their perception of inclusivity, the gap remains in equity for women and persons of color, especially the indigenous or intersectionality backgrounds. How much richer might the heritage of American architecture have been if the professional legacies stemmed from more inclusive workplaces. One might have believed that the profession would broaden its base since it grew to be over 100,000 for those who presently call themselves architects. The leadership has been saying their efforts have shown progress, only in the pipeline for the future graduating women and other minorities, who have never held a proportional share

³⁴¹ Rydell, *Democracy by Degrees*.. Bob's speech at the 125th celebration of the founding of the first land grant college in Montana included this comment about the past as he and President Waded Cruzado uncovered the donated sculpture of Abraham Lincoln who signed the Morrill Act into law and created the land grant college concept. This was another original idea begun in the USA.

of the employment opportunity. Despite total number growth, the final tally ten years after graduation remains less diverse, and it has been that way forever.

The inequity discovered by scouring the records and AIA Diversity reports makes me believe that it has to do more with who does the child-rearing in the world. The United States is better than, say, the UK in its diversity but needs much more employers to participate. Initially, I used this problem with equity as my excuse not to join their numbers count. That was a futile gesture for decades later; a four-fold growth in the AIA since I took my first job in architecture has not changed the disparity. I feel the need to speak out³⁴² is even greater now that I am an emeritus member.

Will solutions to the neoliberalism grip on world economies help, or giving more agency to push back against the established authorities? Of course, it would. After the dissertation allowed me the perspective for studying the problems hindering both historic preservation and equity in the profession, I am more convinced that the first step is a more aware civil society that is inclusive in and of itself and wants the other two sectors of society to be reflections of the diverse humanity.

With the economy going through its boom and bust cycles, there is always another bubble with a growing need for architects. This demand for talent in design and building has been especially true for more than a decade since the great recession of 2008.

With a decade-plus long continuous bull market, the economy has demanded rapid expansion not only in the cities. Developers vie to satisfy the growing migration of the

³⁴² Barry Sulam and DeHaas, John and Cheever, Hurlbert C., "Unpublished History of the School of Architecture at Montana State University" (School of Architecture, MSU, 2016 2000), 2000. I wrote an accompaniment piece called Women in the School of Architecture that continued the reporting that Pamela Hill began in the 1990s.

population to the amenity-rich Rockies or Northwest micropolitan areas. They apply the same strictures of the neoliberalist economy that grew in megalopolis multinational cities to beat the competition. Only with outside investment can this expansiveness afford the ‘price’ of development. Besides the rising cost of new buildings, they pay to play rather than absorb all of the externalities shifted to the public’s purse to bear. These are not new to the professionals as they weathered the panics on the banks and Great Depression aided by the federal programs for unemployed architects called HABS in partnership with the AIA.

Several key informants have commented that, perhaps, the younger or even mid-career architects are no longer aware of their institutional past. There has been a long-held bias in their education for modern architecture, with its minimalist vocabulary, that was *de rigueur* for educating their professors. Their insights may have been prejudiced about those precursors to the modern idiom, and it became a strictly enforced stylistic movement and turned away anyone wishing to remain connected to a continuum from the past. Practicing architecture from the rear-garde, clinging to historicism, was diametrical to trying to be in the avant-garde.³⁴³ Even at the cost of imitative reductionist plagiarism of an iconic modernist, trying to be in step was preferable to any harkening back to a *ye olde* time. Even worse would be the iconoclastic or individual originalist who stayed outside what was in vogue as defined by those who wanted to be popular.

Architectural educators may be skipping over the thirty-year-old *mea culpa* from 1991 when the AIA endorsed (posthumously after three decades) a Kennedy Center for the Arts award for the forward-thinking Frank Lloyd Wright; named the ‘greatest American architect.’ In

³⁴³ Dahlin, “The Aesthetics of Frank Lloyd Wright’s Organic Architecture: Hegel, Japanese Art, and Modernism.”

addition, his collection of eight extant architectural gems have been declared a new World Heritage Site by UNESCO. The World Heritage listing brings the United States total to twenty-four. This listing is for eight sites called the 20th Century Architecture of Frank Lloyd Wright, and all but one of them is open to the public in six different states.³⁴⁴ The other is a home in continuous use by owners.

William Cronon of the University of Wisconsin in Madison wrote a piece about the native son of Wisconsin, Wright. The 1994 MoMA publication perhaps was an act of contrition by the venerable modern art museum due to their curator Philip Johnson's slight of Wright. As the curatorial director of the show, defining examples of the International Style of the modernists, he was excluded by Johnson. Wright did not adhere to the minimalist's limited vocabulary expected from strict adherents to the stylebook that the show promoted in the post-WWII era. Instead, Johnson gave center stage to Charles-Édouard Jeanneret, known as Le Corbusier, a Swiss-born French citizen who had captured the imagination of the younger architects for decades afterward.

Wright's mentor Louis Sullivan, credited with the Chicago School of modern design for high-rise commercial structures following the great Chicago fire, was included in the 1893 Columbian Exposition. The insiders of New York and Chicago architects led by Burnham and Root chose uniform neoclassical simulacra of European architectural extravagance. Sullivan dissented with a non-conforming, modern masonry façade designed for the Transportation Pavilion. Perhaps Wright worked on it in Sullivan's studio before he went out on his own that

³⁴⁴ The sites represent the major phases of Wright's long career and includes the most photopahed site The Guggenheim Museum in New York City. <https://www.nps.gov/articles/000/the-20th-century-architecture-of-frank-lloyd-wright-world-heritage-site.htm> also <https://flwright.org/aboutus/world-heritage>

same year. Wright was credited with the Prairie School of design as an addition to the American corpus of architecture. He became renowned in Europe and Japan and helped kick off their modern idiom designs that inspired the modernists there for most of the Twentieth Century.

Initially, Wright's master plan concept was to build over Lake Michigan and not alongside, as in the 1893 Columbian Exposition. However, that water-based idea was rejected, and then he was excluded from contributing one of the pavilions that had to comply with a committee's preconceived moderne-style for the 1933 Chicago Worlds Fair: a Century of Progress.

Despite the introduction of moderne-styling, most American architecture followed the classical revival of ancient European monuments for decades following the White City exposition of 1893 that featured only classical revivalism. After the International show at the MOMA, decades later, the American architects imitated the modernists for the next four decades until even Philip Johnson flip-flopped and joined others as they portrayed a post-modern style with the imposition of reductive historicism tossed into the mix. Styles change slowly in architecture, and when an architectural gem in one era loses its gleam because of changing preferences, they sometimes fall prey to the wrecking ball.

The urge to rewrite the story of the built environment³⁴⁵ was undoubtedly true for Wright, whose career spanned over seventy years. Cronon offered a view of Wright that could explain

³⁴⁵ FLW developed affordable houses for usonians, about 65 of them and some are still used. It has been called an architecture of democracy. His other theoretical master plan for Broadacre City is an idealization of Jeffersonian return to a pastoral along a middle way that is both anti-urban and technologically enhanced. In 1958 Wright revised and expanded his original concepts in the book, "The Living City." Internet connectivity has made aspects of Broadacre already a positive aspect of living remotely and networking for a living. More still needs to be done, he might insist, regarding his despised traffic gridlock on the roads and pollution.

the ethos of many practicing architects who must compete for commissions in order to survive in the feast or famine of a heated building marketplace:

No building seemed permanent to Wright because none could reflect for more than an instant the multifaceted geometric ideal that was in his mind. Perhaps this is why he was apparently undisturbed when one or another of his buildings was torn down. “I have learned not to grieve long,” he wrote, “now that some work of mine has met its end.”

One of the three Wright building projects in Montana was the Bitterroot Inn in Stevensville, which burned to the ground in the 1920s. As a result, of the original thousands of buildings, only 400 extant Wright-designed examples are left in the United States after 130 years since he began his practice.

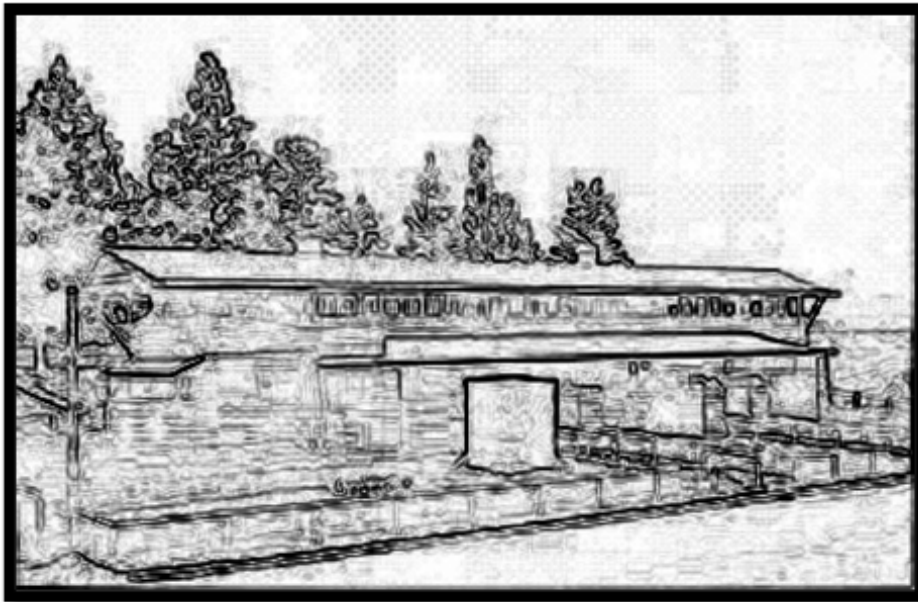


Figure 66. Bitterroot Inn in Stevensville, MT Lost in 1920s; Sketch Effect by Author

As per Ellen Baumler's Blog, [Montana Moments](#), Wright was offered commissions in Montana early in his solo career:

The Como Orchards Colony, also known as the University Heights subdivision, near Darby's Bitterroot Valley was an experimental planned community. Wright came to Montana in 1908 to research the site and designed the Como Orchards as a summer refuge for university professors. A lodge and thirteen cottages were completed. One small cottage, a one-room cabin, and a tree-lined drive are all that remain today of Wright's experiment. It was an innovative idea and very early use of the prairie style that made Wright famous.³⁴⁶

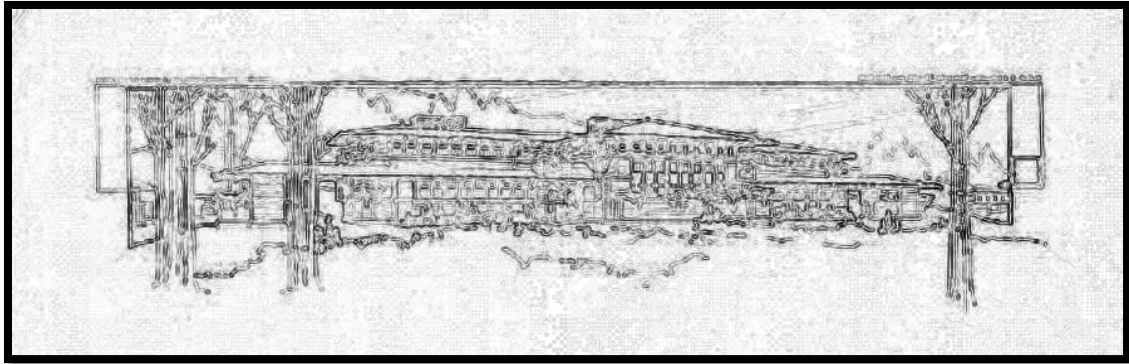


Figure 67. Como Orchards Sketch

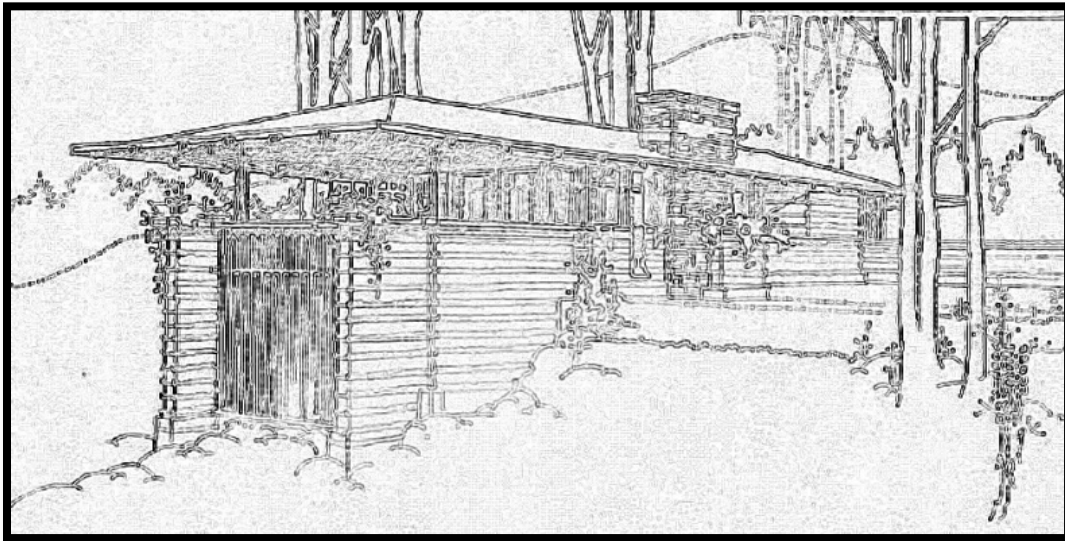


Figure 68. Como Colony Design by Wright, Sketch Effect of the Lodge and Cabin

³⁴⁶ <http://ellenbaumler.blogspot.com/2013/07/frank-lloyd-wright-in-montana.html>

Two projects by Wright were still extant in Montana until the 2010s. One was a design in the Bitterroot valley called the Como Colony and a single-story professional building in Whitefish called Lockridge Medical Center.



Figure 69. Lockridge Medical Center by Wright: Before and After Demolition

Under cover of night, an impatient developer took down an original ‘Usonian’³⁴⁷ styled commercial building for a more profitable three-story commercial building near Whitefish, MT. Wright fans and preservation groups wanted to save it from demolition, but the developer, ignoring national pleas to save it, acted when the groups could not raise the money. Like holding the Wright building as a hostage, the developer did away with it under cover of darkness, thus canceling the Usonian gem; whatever memories of going to doctors’ offices or the recent legal firm’s reuse were canceled. Thus, a metaphorical Sword of Damocles hangs over the Midcentury Modern medical arts compound in Bozeman after a half-century of serving the old hospital and commercial

³⁴⁷ “Usonian,” Frank Lloyd Wright claimed the word for his “aspiration to create a democratic, distinctly *national* style that was affordable for the “common people” of the United States. As per writer Henry Duff Law in 1903 “we in the United States have no right to use the title ‘Americans’ when referring to matters pertaining exclusively to ourselves.” . . . <http://ellenbaumler.blogspot.com/2013/07/frank-lloyd-wright-in-montana.html>

downtown. The blade may fall soon after the planning approval is granted for its redevelopment and inevitable demolition. How Wright might have felt about this loss was predicted by Cronon:

He (FLW) took comfort from the fact that its image would survive in photographs, and these would spread its memory “as an idea of form, to the mind’s eye of all the world. It was the lesson of the folly: the architect could not help but be a builder in the sand, and his works could not hope to escape what Wright called “the mortgage of time ... on human fallibility foreclosed. Buildings, like their architects. were mortal³⁴⁸

Americans’ rootlessness as manifest in social issues could be to blame for the losses of significant works by America’s architect Frank Lloyd Wright. Nevertheless, despite the loss in the Whitefish, MT demolition to the only Usonian building in the state by Wright, there is a new spirit. Many groups are seeking alternatives to the dynamic of the marketplace. To name just a few would include employee-owned cooperative models of designers and producers; green-friendly community-wide building concepts such as those labeled co-housing in Europe and catching on in the United States; coupled with the increasing use of alternative energy sources at the scale of new communities and older neighborhoods relying on new technology; and down to the more ascetic scale and physically minimalist abodes called ‘tiny houses.’ Together, they could solve some of the housing problems connected with the three problems that have impacted historic preservation and the built environment (neoliberalism, agency and authority, and an aware civil society).

³⁴⁸ William Cronon and Terence Riley, editor. ““Inconstant Unity: The Passion of Frank Lloyd Wright,” In *Frank Lloyd Wright: Architect*, 8-31. (New York: Museum of Modern Art, 1994.

Other future visions to make a rural renaissance that will take people coming home again, or as Wendell Berry³⁴⁹ called it: Homecoming can be modeled after the Broadacre City concepts by Frank Lloyd Wright when he was out of work at age sixty during the Great Depression.

Broadacre City, according to the Frank Lloyd Wright Foundation article by Jennifer Gray, was a thought experiment raising questions and

Conceived at the height of the Great Depression, Wright never intended to build Broadacre City but rather used it as a vehicle to address pressing social, economic, and environmental issues, many of which have contemporary relevance. His vision invites us to reflect on questions of our own time, such as the role of government, social and economic equality, infrastructure and sustainability, and how to foster community.³⁵⁰

In Frank Lloyd Wright's own words from his 1932 book *Disappearing City*,³⁵¹

These outlines...may seem to the patient reader who has come with me so far, another Utopia to join the many, come and gone³⁵². I am not trying to prove a case. My interest lies in the nature of the elemental changes...and there is plenty of evidence. Here ... is a study based upon an architect's experience in trying to get an organic architecture born for these United States.

³⁴⁹ Berry, Wendell. *The Way of Ignorance: And Other Essays*. New York: Counterpoint, 2006.
<http://www.myilibrary.com?id=246957>.

³⁵⁰ Gray, "Reading Broadacre."

The Broadacre City exhibition was sponsored by the National Alliance of Art and Industry, a Rockefeller-funded initiative that endeavored to educate the public about advances in American industry.

³⁵¹ Wright put together both his *Disappearing City* and *Broadacre City* books into a new volume called the *Living City*.

³⁵² Robert S. Fogarty, *All Things New: American Communes and Utopian Movements, 1860-1914* (Lanham, Md: Lexington Books, 2003). Between 1860-1914 in America, Prior to the Great Depression of the Thirties, there were 141 utopian visions reported by Fogarty.



Figure 70. Sketch Effect of the Model of Broadacre City at MoMA Show Unpacking the Archive³⁵³

Speaking of predictions, perhaps Wright was the one Will Rogers foretold about in Chapter One of the dissertation's opening pithy epigram. Wright was the one who had a telescope, and a burning passion for architecture, that he showed the world. His corpus illuminated with what else may be possible, and for all his efforts, a lasting foundation has kept alive those photos and drawings just as he had predicted. Unfortunately, those images would be all that is left after the demolition of the built architecture. However, the message of his legacy can still illuminate the future because he and those who followed him are in the Foundation can still use his telescope and a searchlight to show the way forward. The Usonian ideal called for all to follow, the Broadacre way of life if the United States loses its way as it did during its darkest times of the Great Depression. Learning Places will be online ready to assist in making towns more resilient for those who return to help Save Cultural Resources by Learning Places.

³⁵³ Bergdoll, Gray, and Wright, *Frank Lloyd Wright*.

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APPENDICES

APPENDIX A

GRASSROOTS ADVOCACY

During the research for this dissertation, I recall some questions asked in conversations with colleagues about the fundamental reasons why any of them should be concerned with the plight of an older private property that may qualify for recognition as a historic property. Later I was asked what anyone can do about the potential loss of a National Register-listed historic place if they do become concerned. My answer to both questions was embedded in the launch of Learning Places. In the online course, an interested person or organization can find why others have become advocates for historic preservation and, in particular, those who want to know more about the Historic Tax Credits.

In the next five of the six-part appendix, included in the dissertation, there will be several informative tables and maps by the coalition for Historic Tax Credits regarding its continued utilization and the regular attempts at advocating for its continuation by congressional oversight committees even its enhancement. What someone can do if they want to become an advocate for historic preservation and stay aware of the actions by Congress has been outlined in the following excerpts from the National Trust. In addition to the Trust, there is another advocacy group that Learning Places has joined, Preservation Action³⁵⁴, which sponsors grassroots advocacy days in the Congress with pre-arranged face-to-face meetings with key committee members whose role is the oversight of the HTC.

These lobbying days in the halls of the government at the state or federal level can change the course of legislation. The national organization NTHP has stopped many buildings

³⁵⁴ Preservation Action is a national advocacy group that often lobbies Congress' House Appropriations Subcommittee on Interior, Environment and Related Agencies for preservation causes.
<https://preservationaction.org/actioncenter/advocacyweek/>

from demolition by creating publicity around its plight. There were eleven NHL and NR sites listed on the NTHP's Eleven Most Threatened and Endangered list over the past 32 years in Montana alone. Having nearly three percent of the nation's most endangered historic places is not a virtue, and indeed, a dubious boost for tourism, and yet the following cherished places were on the brink of a significant loss to their integrity from any number of causes.

Table A.1 The Sites Included in the Eleven Most Endangered List by the NTHP

#	Year	Sites	#	Year	Sites
1	1988	Custer Battlefield, MT	13	2002	Pompey's Pillar, MT
2	1992	Virginia City, MT	14	2004	Nine Mile Canyon, UT
3	1993	Virginia City, MT	15	2006	Kootenai Lodge, Big Fork, MT
4	1993	Sweetgrass Hills, MT	16	2007	Minidoka Camp, Hunt, ID
5	1994	Virginia City, MT	17	2007	Pinon Canyon, CO
6	1995	South Pass, WY	18	2008	Great Falls Portage, GF, MT
7	1996	Historic Structures	19	2013	Schoolhouses in MT
8	1997	Glacier NP, MT	20	2016	Bears Ears, UT
		Flathead Reservation, MT			
9	1998	Mesa Verde, CO	21	2018	Larimer Square, Denver, CO
10	1999	Travelers Rest, MT			
11	2000	Red Mtn. Mining, CO	22	2019	Southeast Utah Sites, UT
12	2001	Telluride Valley, CO			

Total for Northern Rockies since 1988

Montana = 12, Colorado = 5, Utah = 3, Idaho = 1, Wyoming = 1.

NTHP, for its 30th-anniversary "Eleven Most Endangered Historic Places List," reported good news as well. The Travelers' Rest once again appeared on the list, but only this time, it was

for good reasons. The Forest Service and State Park's jointly run site was out of danger from encroaching development and remained the best site on the long journey of Lewis and Clark to offer up archaeological finds. Of course, excellent news for Montanans, and it included a new visitor center.

The National Trust for Historic Preservation online version of their 'How To' go about promoting advocacy efforts has recently been their most effective ever by garnering over 40,000 letters and messages to Congressional Members of the United States. Using digital means for the most effective campaign to help save the HTC was most likely due to their following the methods suggested below. See the highlights of their information. This summary answers the question of what someone can do to advocate, besides enrolling in Learning Places, of course:

- “Engaging in the political process ...and communicating with elected officials As preservationists, ...it is our responsibility to communicate directly with decision-makers and to help them understand the benefits and value of historic preservation.³⁵⁵”
- “Grassroots advocacy is collective citizen action to influence decision-makers. Its goal is to activate a broad group of people to take action on an issue and give those people the tools to communicate effectively to their elected officials. This “bottom-up approach” allows the voice of every American to be taken into account in the political process.”

³⁵⁵ Rhonda Sincavage. *Growing a Grassroots Network*. Director of Content & Partnerships. Washington, D.C.: National Trust for Historic Preservation, 2020. <https://savingplaces.org/>.



Figure A.1. Grassroots Lobbying Day Demonstration Sketch

Table A.2. Advocacy, Coalition Building, and Grassroots Actions

Methods for Advocacy and Who Would Make a Helpful Advocate ³⁵⁶			
	What Can You Do		Likely Sources of New Advocates
1	“Exchanging contact lists with other organizations.”		• “Statewide preservation organizations”
2			• Main Street organizations
3			• Business/property owners
4	Asking those who join online forums and online events to sign up to become advocates.		• community and neighborhood organizations
5			• Affordable housing groups
6			• Cultural associations for underrepresented history
	Collecting names and contact information at events (a sign-up sheet and card drop can work but make sure they know how you plan to use their email address, so they have an option to give you the information or not).		• Tourism Associations / Convention & Visitors Bureaus
			• Educational institutions
			• Historic sites
	Using the “tell a friend” option on email communications.		• Chambers of Commerce
			• Small business support organizations
			• State historic preservation office / Main Street coordinators
			• Local elected officials
			• Real estate/economic development professionals

³⁵⁶. Rhonda Sincavage. *Growing a Grassroots Network*. Director of Content & Partnerships. Washington, D.C.: National Trust for Historic Preservation, 2020. <https://savingplaces.org/>

	Sponsoring advocacy events such as workshops, lectures, or press conferences. Partnering with other organizations for a social media takeover to attract new followers.”		• Architects and planners • Environmentalists • Outdoor recreation groups • Religious Institutions • Affinity Interest groups • Smart growth organizations • Other organizations that support preservation goals.”
	Add Your Ideas Here:		
	A Few Examples of Advocacy Mobilization Tools		

1	Social Media site	1	Use Facebook or other sites for standing links and then provide newsy items as posts for advocacy actions (e.g. petitions.)
2	Website -	2	On a group's website, there can be links to new pages with more information on the background of an issue, updates from past reports, and whom to contact the decision-makers. Then, place those appeal letter samples and other talking points.
3	Newsletter	3	An in-depth article by experts on particular events and status reports. Use regular publication by offering an article to focus on an issue.
4	Electronic Alert –	4	Outside supporters can learn and be familiar with your cause. Call to action via a mass email list alert. Send to everyone using the bcc address.
5	Lobby Days: Meetings at City Hall, Congress, Events, and Receptions	5	Go with other advocates on the regularly scheduled lobby visits to Congress, State Legislatures, City Hall after basic grassroots training. Meet and greets with elected officials by your diverse group of advocates for a common cause.
6	Provide Debriefing	6	Provides feedback using (e.g., email, text, forms online, or report at meetings) for advocates to share any responses they Sharing what decision-makers said at face-to-face Lobby Days.
The Trust³⁵⁷ concludes with this optimistic encouragement: “There is no limit to what can be accomplished with a strong grassroots network that understands and advocates on behalf preservation policies or adoption of revitalization tools.”			

Another comparison was completed to find where Historic Tax Credits would rank against two prevalent programs that have preoccupied the architectural and city planning field.

³⁵⁷ Rhonda Sincavage, *Growing a Grassroots Network*, Director of Content & Partnerships (Washington, D.C.: National Trust for Historic Preservation, 2020), <https://savingplaces.org/>.

The two programs compared to HTC are about the same age and have been operating since the nineties. One is a federally funded Brownfield mitigation or cleanup competitive grant program called BUILD. Its diffusion throughout the metropolitan areas with toxic sites was measured to find the factors that made the program work in some cities, and others were lagging the trend. Industrial sites could be cleaned up in this program and historic schoolhouses and buildings with asbestos or lead paint, for instance.

The private sector initiated the second program under the aegis of the Green Building Industries Council. A partnership between design professionals, building owners, and those industry manufacturers striving to make their equipment more efficient and less carbon consumptive. The program is commonly called LEED and refers to Leadership in Energy, and Environmental Design acts as a demonstration. Over a hundred thousand professionals returned to continuing education outlets online to learn how to provide more energy and carbon-neutral efficiencies.

The following chart compares the two programs with the HTC for historic preservation rehab tax credits to see which one has the acceptance by the public for utilizing it:

Table A.3 Comparison of HTC to LEED and BUILD

Comparison of Programs for Improving the Built Environment						
	#/k	\$/B	Jobs/k	Tax Gain	# States	Score
HTC	42	\$131	244	5	al	422
BUILD	20 0	\$35	176	-24	al	387
LEED	10 3	\$200	100	20	al	423
Total	34 5	\$366	520	1	al	123 2

Table A.4. Ranking Programs per Factor

HTC	3	2	1	2		8
Brown	1	3	2	3		9
Green	2	1	3	1		7
Total	6	6	6	6	0	24

BUILD: Brownfields is in the last place due to the cost to taxpayers.
 Historic Tax Credits is second place + saves historic buildings
 LEED creates more new projects reducing energy consumption

APPENDIX B

FROM THE LITERATURE

(Chapter Two Part II.2)

A logic model was mentioned a few times in the dissertation content, and the template came out of the work in Dr. Shannon Arnold's Agricultural Education graduate course for designing programs and evaluations typically for extension service agencies nationwide. It was an online course attended by many in Extension positions in other states. My dependence on the ethnographic methods under the acronym REAP was aided by having my Logic Model guide the design and launch of the online course, Learning Places. Logic Models encourage measurable, quantifiable goals in the form of short-term and long-term outcomes. I tracked my inputs and outputs in this way as well. The first thing required of this process was to scan the environment that resulted in my problem statements and research questions.

The following page contains the draft of my logic model³⁵⁸ based on this graphic from the Kellogg Foundation.

³⁵⁸ W.K. Kellogg Foundation, *Logic Model Development Guide* Cooperative Extension and community members," followed a step-wise process, based on a logic model. Guidelines and Framework for Designing Basic Logic Model, http://www.authenticityconsulting.com/#_blank

Table A.5. Logic Model

INPUTS	ACTIVITIES	OUTPUTS	OUTCOMES		
			SHORT-TERM	MEDIUM TERM	LONG-TERM
WHAT WE INVEST	WHAT WE DO	DIRECT PRODUCTS PROGRAM ACTIVITIES	Changes in knowledge, skills, attitudes, opinions	Changes in behavior or action that result from participants new knowledge	Meaningful changes, often in their condition or status in life
Self funded	Develop and disseminate education materials	6 modules written for I.D.E.A.L.S.	Modules provide self paced sources for research by learners whose knowledge increases with required readings.	Learners change where they seek continuing education by going online and self regulate their own progress.	Learners are able to pay for tuition or seek stipends as they make the course a priority for their education goals
Subscribe to a Learning Mgmt. System (LMS)	Launch an online course	Upload educational lessons, assessments, quizzes	Attitudes become more committed to completing the course and helping the community project goals.	Learners needing annual continuing education credits re-enroll in course	Learners offer their projects as case studies for future learners sake.
Dues for associations	Attend meetings, publish articles for newsletters, publicize online course	Write marketing flyers, graphics, ads	Learners are motivated to join Associations that promote more historic preservation actions.	Learners attend Association meetings to continue to learn how to help their community projects	Learners behavior as Association members matures into leadership roles
Provide time for cohorts	Serve as moderator for service learners online	Grade and analyze assessments for all 6 modules	Learners take quizzes after completing required reading and meeting with community leaders for project recommendations.	Learners make time available for their chosen community service via online learning	Communities seek learners help in writing nomination forms to the National Register for Historic Places (NR).
Enroll service learners and community project leaders	Provide guidance, act as role model and advisor	Process 6-10 learners per cohort five times / year	Learners recommendations are referenced to the Secretary of Interior Standards for Rehabilitation.	Learners spread by word of mouth the benefits of the online learning course	Learners form groups through workplace to get discounted tuition when enrolling again
Serve as facilitator for vetting Continuing Ed credits	Using rubrics for quizzes evaluate success by learners	Issue certificates of completion	Learners participate in online discussion groups and form a service learner community while online for their cohorts benefit	Learners can offer advice to clients and community about the value of Historic Tax Credits (HTC)	Service learners develop qualified rehab designs / implementation grant funding options so that their community project gain approval by HTC or NR programs.

APPENDIX C

THE ONLINE COURSE AS AN INTERVENTION

(Chapter Three Part I)

The online course as intervention snapshots are partially explained and illustrated in a supplement to the dissertation. The supplement is a partial representation of the interactive online course content that can be reviewed at the learning management system website through the following link: [Link for Learning-Places](https://www.cacadianow.org/learning-places)

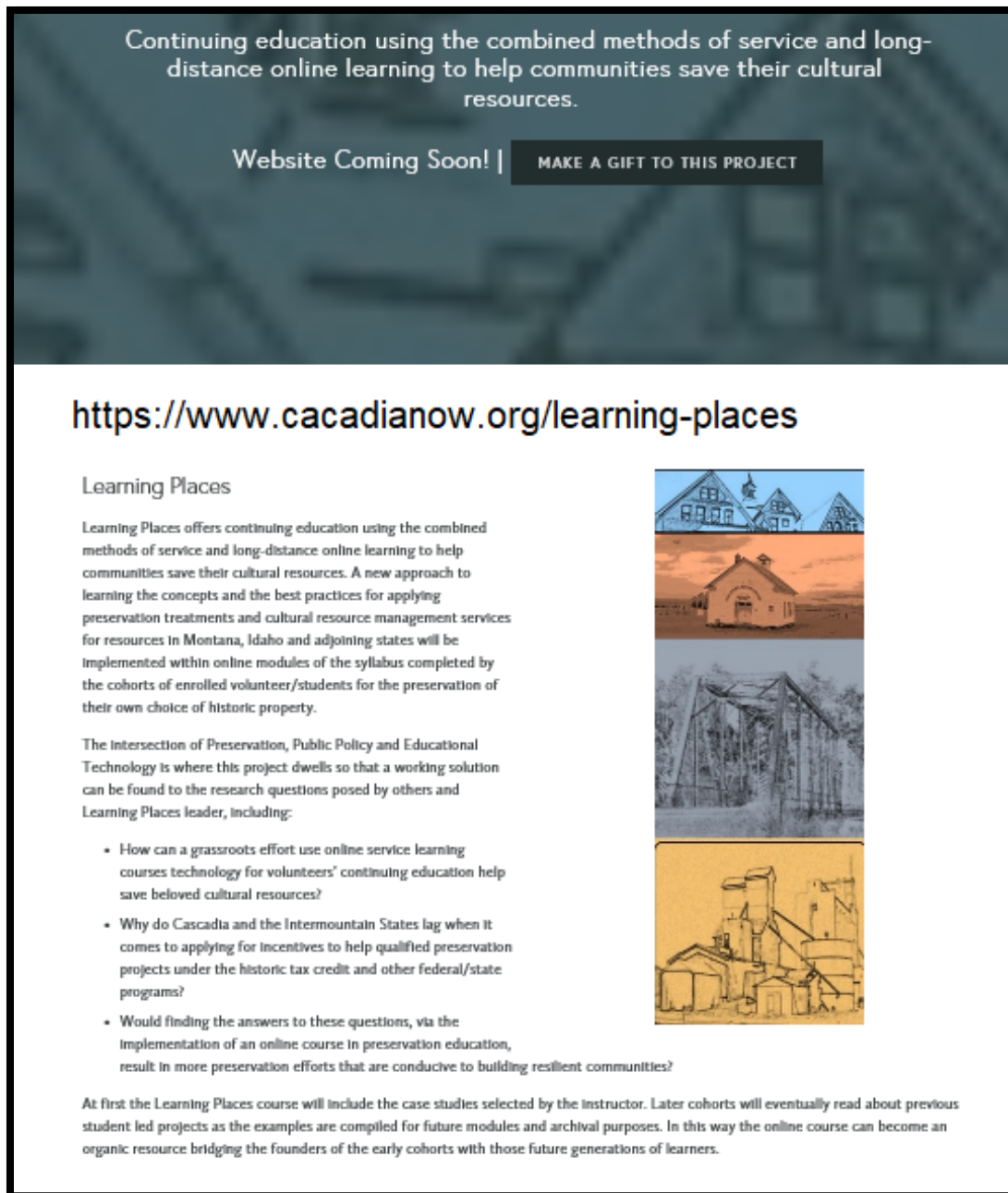


Figure A.2. Learning Places Website

So the complexity of the nomination process for a historic building can be appreciated I included the following two illustrations of the nomination checklist for the Technical Review:

Table A.6. National Register Nomination for Technical Review

NATIONAL REGISTER NOMINATIONS TECHNICAL REVIEW	Section 8. Statement of Significance
General Review ☐ Have all the blanks been filled, including "n a" where applicable? Section 1. Name of Property ☐ Is the name entered the one that best reflects the property's historic importance or was commonly used for the property during the period of significance? Section 2. Location ☐ Are all items completed? Are the correct codes used? Is the name of the federal land area noted, if pertinent? If the property needs certain protection, has "not for publication" been checked? Section 3. Certification ☐ Is a Level of Significance checked? ☐ Is the form signed by a SHPO, THPO, FPO, or authorized delegate? ☐ For concurrent nominations, have both parties signed the form? Section 5. Classification ☐ Are all items completed? Is there a clear identification of the number of contributing and noncontributing resources? ☐ Does the resource count agree with the narrative in Section 7? Section 6. Function or Use ☐ Have the historic and current functions been indicated, using functions listed in the <i>How To Complete the NR Registration Form Bulletin</i>? Section 7. Description ☐ Have the Architectural Classification and Materials sections been completed (where appropriate)? ☐ Is there an initial paragraph that identifies what is being nominated, summarizes its appearance, and describes the property's integrity? ☐ Have all alterations to the building site over time been described and dated, to the extent possible? Do the descriptions of contributing/noncontributing resources agree with the resource counts in Section 5? ☐ For historic districts, is there a complete inventory list or accompanying sketch map identifying all resources counted and marked whether they contribute or not?	☐ Has all pertinent information been included? The following are mandatory: Applicable NR Criteria, Areas of Significance, and Period of Significance. The following may be needed: Significant Person (if Criterion B is applicable), Cultural Affiliation (if Criterion D--and in some cases Criterion A--is applicable), Significant Dates and Criteria Considerations, as pertinent, and Architect Builder (if "work of a master" pertains). ☐ Does the Narrative Statement include a summary paragraph indicating the pertinent NR Criteria, the period of significance, and the areas and level of significance of the property? ☐ In subsequent paragraphs, is the case made for each Area of Significance as it relates to a particular historic context theme? Section 9. Major Bibliographical References ☐ Are bibliographic sources provided? Section 10. Geographical Data ☐ Does the verbal boundary description delineate the precise area within the boundaries of the property, not just a general location? ☐ Is the specific number of acres given? Is it consistent with the size of the area noted within the boundaries? ☐ Are lat long coordinates or UTM references provided? Is the minimal requirement of three points given, if the property is 10 or more acres in area? Section 11. Form Prepared By ☐ Is the preparer identified, with contact information? Maps ☐ Is a locational map with defining coordinates enclosed and properly labeled? ☐ Is a map enclosed for historic districts that contains a north arrow and a scale? Photos (Updated NR Photo Policy 2013) ☐ Are the photographs on the correct paper and appropriately identified and labeled? ☐ Is a photo log included? For historic districts, are photos keyed to the district map? ☐ Are the photo files saved as TIF files at the correct resolution on an archival quality CD?

Table A.7. NR Listing Substantive Review Form

NATIONAL REGISTER NOMINATIONS SUBSTANTIVE REVIEW	
Section 1. Name of Property ☐ Does the property name accurately reflect <i>historic ownership</i>? Section 7. Description ☐ Does the descriptive narrative accurately reflect the checked? ☐ Are the important features of the property identified in the Description Section, including site, date, materials, style, size, roof-shape, story, plan, windows, foundation, details, interior? ☐ Does the Description include information about the setting, environment, and or surrounding buildings/areas? ☐ Is the Description clear and complete? If the property has been altered, is the difference between the original (or historic) and the current condition and appearance clear? ☐ Does the description convey the significant qualities of the property? Through what features? Do these features retain integrity? ☐ Have contributing and noncontributing features been identified? ☐ Have alterations (if any) been adequately described? Has the evaluation of their impact on the integrity been made? Have alterations been evaluated regarding significance that may have accrued over time?	Section 8. Statement of Significance ☐ Does the narrative clearly represent and convey the period of significance checked? Has the period(s) been justified in the Statement of Significance? ☐ Does the specific date or date range reflect the property's period of historic significance? ☐ Do the Areas of Significance reflect the significance of the property, not just its function? ☐ Is the Statement of Significance written in a clear and complete manner? ☐ Have all the applicable criteria been identified and documented within the Statement of Significance? ☐ Are any criteria exceptions (if applicable) justified according to their specific requirements? ☐ Does the context in which the property has been evaluated as significant justify the local, state, or national level of significance chosen for the property? ☐ Does the integrity relate to the overall property, not its features and parts? Section 9. Major Bibliographic References ☐ Is there evidence that the bibliographic sources noted have been used in the preparation of the nomination? Section 10. Geographical Data ☐ Have the boundaries been drawn to include all features directly related to the significance of the property? ☐ Have the boundaries and the acreage been justified?

Professional Qualifications Standards

The following is an excerpt from the National Park Service website:

The professional qualification standards used by the National Park Service have been previously published in the Code of Federal Regulations, 36 CFR Part 61³⁵⁹. The qualifications define minimum education and experience required to perform identification, evaluation, registration, and treatment activities. In some cases, additional areas or levels of expertise may be needed, depending on the complexity of the task and the nature of the historic properties involved. In the following definitions, a year of full-time professional experience need not consist of a continuous year of full-time work but may be made up of discontinuous periods of full-time or part-time work adding up to the equivalent of a year of full-time experience.

History

The minimum professional qualifications in history are a graduate degree in history or closely related field, or a bachelor's degree in history or closely related field plus one of the following:

1. At least two years of full-time experience in research, writing, teaching, interpretation, or other demonstrable professional activity with an academic institution, historical organization or agency, museum, or other professional institution; or
2. Substantial contribution through research and publication to the body of scholarly knowledge in the field of history.

Archaeology

The minimum professional qualifications in archaeology are a graduate degree in archaeology, anthropology, or closely related field plus:

1. At least one year of full-time professional experience or equivalent specialized training in archaeological research, administration, or management;
2. At least four months of supervised field and analytic experience in general North American archaeology, and

³⁵⁹ For Architect's Standards of Qualifications: Required Professional Qualifications for cultural resource fields.
https://www.nps.gov/history/local-law/arch_stnds_9.htm

3. Demonstrated an ability to carry research to completion.

In addition to these minimum qualifications, a professional in prehistoric archaeology shall have at least one year of full-time professional experience at a supervisory level to study the archaeological resources of the prehistoric period. A professional in historic archaeology shall have at least one year of full-time professional experience at a supervisory level in the study of archaeological resources of the historic period.

Architectural History

The minimum professional qualifications in architectural history are a graduate degree in architectural history, art history, historic preservation, or closely related field, with coursework in American architectural history, or a bachelor's degree in architectural history, art history, historic preservation, or closely related field plus one of the following:

1. At least two years of full-time experience in research, writing, or teaching in American architectural history or restoration architecture with an academic institution, historical organization or agency, museum, or other professional institution; or
2. Substantial contribution through research and publication to the body of scholarly knowledge in the field of American architectural history.

Architecture

The minimum professional qualifications in architecture are a professional degree in architecture plus at least two years of full-time experience in architecture or a state license to practice architecture.

Historic Architecture

The minimum professional qualifications in historic architecture are a professional degree in architecture or a state license to practice architecture, plus one of the following:

1. At least one year of graduate study in architectural preservation, American architectural history, preservation planning, or closely related field; or
2. At least one year of full-time professional experience on historic preservation projects. Such graduate study or experience shall include detailed investigations of historic

structures, preparation of historic structures research reports, and preparation of plans and specifications for preservation projects.

Web Sites of Historic Preservation Interest

- NPS Webpages: (Press Control and Click for Links to an External Site.)
- www.nps.gov/history: History in and outside of parks
- National Park Service Take Action Websites of Interest for Learning Places:
- Go to <https://www.nps.gov> >Home>Take Action> see list below [NPS.gov/Home/Take Action/](https://www.nps.gov/Home/TakeAction/)
- For Funding HP: <https://www.nps.gov/subjects/historicpreservation/fund.htm>
- For Learning HP: <https://www.nps.gov/subjects/historicpreservation/learn.htm>
- For Promotion of Site: <https://www.nps.gov/subjects/historicpreservation/promote.htm>
- For Inclusive Stories: <https://www.nps.gov/subjects/tellingallamericansstories/index.htm>
- For Protection: <https://www.nps.gov/subjects/historicpreservation/protect.htm>
- For Teaching: <https://www.nps.gov/subjects/teachingwithhistoricplaces/index.htm>
- For Lesson Plans: [HISTORY_NHPA-50th-lesson-plan.pdf](https://www.nps.gov/subjects/teachingwithhistoricplaces/index.htm)
- National Trust for Historic Preservation: <https://savingplaces.org/>
- National Park Service Preservation Websites
- ___ Technical Preservation Services:
- ___ Publications <https://www.nps.gov/>
- ___ Historic American Buildings Survey/Historic American and Engineering Record (HABS/HAER/ HALS): <http://www.nps.gov/hdp/standards/habsguidelines.htm>
- ___ National Center for Preservation Technology and Training: www.ncptt.nps.gov
- ___ National Register of Historic Places: <http://www.nps.gov/nr/>
- ___ Federal Historic Rehabilitation Tax Credits: <http://www.nps.gov/tps/standards/rehabilitation.htm>
- ___ Secretary's Standards for Rehabilitation: <http://www.nps.gov/tps/standards/four-treatments/treatment-rehabilitation.htm>

- ___ Preservation Briefs: <http://www.nps.gov/tps/how-to-preserve/briefs.htm>
- Advisory Council on Historic Preservation: <http://www.achp.gov>
- Federal Preservation, State and Tribal Preservation Officers Websites:
___ SHPO list: <http://www.nps.gov/nr/shpolist.htm>
- ___ National Association of Tribal Historic Preservation Officers: www.nathpo.org
- ___ National Conference of State Historic Preservation Officers: www.ncshpo.org
- State Preservation Offices
- ___ Idaho SHPO <http://www.idahohistory.net/SHPO.html>
- ___ North Dakota SHPO: <http://history.nd.gov/hp/>
- ___ Wyoming SHPO: <http://wyoshpo.state.wy.us>

Montana Web Sites

- Country Grain Elevator Society: <http://www.country-grain-elevator-historical-society.org>
- Western Heritage Center: www.ywhc.org
- Montana Cultural Resource Database, SHPO / Montana Historical Society:
<http://svc.mt.gov/adsams/>
- Frontier Heritage Alliance: www.frontierheritage.org
- Virginia City Montana: <http://www.virginiacitymt.com/>

Other Preservation Websites / Resources and Research Tools:

- American Cultural Resources Association: www.acra-crm.org
- American Institute of Architects: www.aia.org
- AIC Code of Ethics and Guidelines for Practice
- https://www.nps.gov/training/tel/Guides/HPS1022_AIC_Code_of_Ethics.pdf
- American Memory: <https://www.loc.gov/collections/>
- National Alliance of Preservation Commissions: <https://napcommissions.org/>
- Preservation Directory: www.PreservationDirectory.com
- Preservation Action: www.preservationaction.org
- Preservation Directory: www.preservationdirectory.com Scenic America:
www.scenic.org
- Society for American Archaeology: www.saa.org
- Society for Commercial Archeology: www.sca-roadside.org
- Sprawl Watch Clearinghouse: www.sprawlwatch.org Education / Technology
- Using Microsoft Photo Story to Create a Digital Story
- http://www.microsoft.com/education/teachers/guides/digital_storytelling.aspx
- Digital Storytelling Resources (Matthews-DeNatale)
- <http://net.educause.edu/ir/library/pdf/ELI08167B.pdf>

- Helen Barrett's iMovie Suggestions
- <http://electronicportfolios.org/digistory/howto.html> - 2-5
- Adult Education Quarterly <http://aeq.sagepub.com/>
- Journal of Extension <http://www.joe.org>
- American Journal of Evaluation <http://aje.sagepub.com/>
- Creative Commons Attribution and Fair Use FAQ:
http://wiki.creativecommons.org/FAQ#How_do_I_properly_attribute_a_CreativeCommons_licensed_work.3F <http://fairuse.stanford.edu/>
- Sulam, Barry (2015-18) Embedded Webpages <https://www.cascadianow.org/learning-places/> Survey Monkey webpage for taking the Survey
<https://www.surveymonkey.com/s/SS5FPPV>
- University of Washington Catalyst - iMovie Introduction
- <http://www.washington.edu/lst/help/video/imovie/index>
- www.franklloydwright.org
- www.ellenbaumler.blogspot.com

APPENDIX D

SURVEY METHODS

The methods discussed in Chapter Four were designed with a strategy to assess the volunteer service learner's knowledge, attitude, and behavior. Indicators of changes in these three areas were measured from the outset of the course, during its five modules of the IDEALS syllabus, and after the completion by the enrollees. The pre-course instruments included an online survey, launched via the SurveyMonkey provider, that asked entry-level questions, and the announcement online appeared as follows:

NOTICE:

Fill out the Pre-Course Online Survey if you have not already done so by clicking on the following link:

<https://www.surveymonkey.com/s/SS5FPPV> (Links to an external site.)

Alternatively, copy and paste into your browser this URL:

<https://www.surveymonkey.com/s/SS5FPPV> (Links to an external site.)

This is a five-minute 10 question pre-course survey. Thank you for completing it before the course begins.

Your completion of the survey needs to be noted so you can proceed with the modules. In addition, the cumulative data from the survey will be very beneficial to the research data analysis of the course's efficacy.

The completed surveys shared the newly enrolled learners' preparation through their prior coursework or work experiences, in historic preservation, previous online learning, and their likes and dislikes of the educational delivery methods. In addition, attitudes were gauged by their preferences, and intentions regarding historic preservation voluntarism were polled.

Samples of the pre-course instruments follow.

Formative evaluations of the participants of Learning Places

SAMPLE OF FEEDBACK ON SAVING MONTANA'S CULTURAL RESOURCES ONLINE LEARNING COURSE: SURVEY					
Name: Architect practicing in Montana somewhere or others having Previewed the COURSE					
Age: any					
Professional Status: Licensed or not, student or an affiliated profession					
For each item identified below, circle the number to the right that best fits your judgment of its quality. Use the rating scale to select the quality number.					
Survey Item	Scale				
	P o o r	Good			E x c e l l e n t
1. "Help is on the way. With the national attention, made by the National Trust for Historic Preservation (NTHP) announcement of the Eleven Most Endangered Historic Sites, there will be a redoubling of an effort. These efforts had already begun in some of the counties where they decided these icons of the rural West were worth keeping." Based on your preview of the Online Course: Saving Rural Schoolhouses in Montana, Rate your opinion of the likelihood that the Course will make a contribution to the ongoing efforts to save these resources:	1	2	3	4	5
2. "The overall goal of this, a Service Learning E-Course, will be for students to learn while serving their local communities through a blend of on-line study and some local face-to-face contact. The course hopes to encourage a comprehensiveness approach in a real world situation through the use of this online mode of Service Learning." Rate how the use of the Online mode of learning, as you previewed in this course, appeals to you for future continuing education delivery:	1	2	3	4	5
3. "National, State and Local sources have given grants to small communities who match the funds and with volunteers work hard at preserving their schoolhouses. They aim to change the odds—in 1918, there were 196,037 one-room schools nationwide—because by 1960 only 13,330 were standing. In Gallatin County alone there once was 77 school districts in 1916 and only 16 remained by 2009. Whether they were, torn down, moved or converted into private residences, only twenty percent of the Schoolhouses remain today." Unfortunately the help, to date, has not kept pace with the need and the local folks preserving their Rural Schoolhouses cannot do it on their own. Rate how well the Online Course that you previewed will prepare the student to help those working to reverse the deterioration caused by years of deferred maintenance and extreme weathering effects while keeping in compliance with the Secretary of Interior's Standards for Treatments of Historic Structures:	1	2	3	4	5
4. "There are far more Professionals practicing in the design and building world than there are these charming symbols of America's greatest experiment: public education for all. The author of this Course exhorts those licensed to practice architecture and related fields to become the change needed to help Save Montana's Cultural Resources."	1	2	3	4	5

	Rate your opinion about the efficacy of the proposals reliance on the concept of "Service Learning" as a personal initiative for the continuing education of professionals based on your preview of the course:					
5.	<i>"The community service will be doubly beneficial to those who enroll in an Online Course offered through the State University system. First, those in need of continuing education credits will receive their entire year's requirement while they make their voluntary donation of time and expertise to help preserve the Rural Schoolhouses of Montana."</i> Rate the next three items based on the statement above and your preview of the course, then place an average score for this item:	1	2	3	4	5
6.	Based on the Item 5: Rate your opinion about hosting this course at the State University	1	2	3	4	5
7.	Based on item 5: Rate your opinion about using the course to fulfill the annual requirement for continuing education in your field, i.e.: some states require 18 - 24 learning units including a majority of health, safety and welfare subjects	1	2	3	4	5
8.	Based on item 5: Rate your opinion about the likelihood of enrollees willingly volunteering their time and expertise to help preserve the Schoolhouses in their local area (beyond the time spent in earning continuing education credits):	1	2	3	4	5
9.	<i>"In-kind services, such as pro-bono architectural services can be used by local nonprofit groups who have to match the funds from grant making foundations and government sources. Some Counties and Foundations use tax-deductible funds established to garner more funding and in-kind donations of time and materials by preservation minded community members."</i> Based on the preview of the course: Rate your own likelihood or your opinion of the motives of others to the opportunity to have a tax-deductible contribution result from participation in Saving Montana's Cultural Resources Online continuing education efforts:	1	2	3	4	5
10.	<i>"Your completion of this Survey will further the efforts for the next stage of the development for the Online Course. The future directions of a course titled Saving Montana's Cultural Resources will take your survey opinions into account. There are many building types and forms of cultural resources in Montana. The author of the course design will make future offerings possible that can delve into the many preservation Issues that are of high priority in Montana's towns and cities and especially its historic rural areas."</i> Rate your opinion on whether to use the courses developed for the future offerings to continue to put a preference on the various building types that come from the vernacular architectural versus the iconic landmarks that have been attributed to specific architectural designers: (Five Rating would indicate your highest preference for continuing with vernacular rural / agricultural structures)	1	2	3	4	5
11.	Rate your experience, likes or dislikes in filling in this survey based on your preview of the Course.	1	2	3	4	5
12.	Do you want to be included in further surveys, if so indicate how much you want be involved and leave an email or cell phone number so the surveys could be sent for your ease in responding next to your name at top.	1	2	3	4	5

Figure A.3. Survey Monkey Pre-Course Questionnaire

Pre Course Survey and Profile / Resume

Published

Edit

Your input to the account Profile with your pre course resume will be required for this assessment before starting week one of the modules. Your prior response to the SurveyMonkey questionnaire will be required as well.

If you posted a pre course resume it can be revised at the end of the course to update your profile with the new Learning Places! experiences that you have successfully completed.

For extra benefits of using the Canvas LMS you may choose to create an ePortfolio at the outset of the course and it too can be updated at the end of course. You may want to keep up your archive of projects with Learning Places online course and the related Google Drive. Your project experience can be added to your ePortfolio resume and show links to the project reports, with whatever graphics were developed for presentations.

The links to the project presentations, that can be uploaded to the Learning Places! Google Drive will both serve as an archive copy by all who enroll in this online course and for selection of future case studies for new modules under development.

Points

10

Submitting

a text entry box, a website url, or a file upload

File Types

doc, txt, links, urls, and blog address

Due	For	Available from	Until
-	Everyone	Mar 11 at 12:01am	-

Some Rubric

Criteria	Ratings	Pts
Profile Profile uploaded using a doc, txt of your resume showing prior preservation experience, online courses.	This area will be used by the assessor to leave comments related to this criterion.	5.0 pts
Survey Monkey Questionnaire Completed on SurveyMonkey via external website	This area will be used by the assessor to leave comments related to this criterion.	5.0 pts

Figure A.4. Pre-Course Survey and Resume

(Chapter Four, Part II.1)

Part II.1. Method One: Formative Evaluation

Method One Approach: a formative evaluation of how the program functions: used a long series of questions³⁶⁰ with multiple choices as a self-assessing means for growing the capacity to provide online learning for the sake of the volunteers.

Good to great			
Potential for distinction		Guiding questions	
With regard to the following capacities, your organization has a high average score and general alignment around these areas as strengths. In these areas, there is potential to move from being effective to being highly transformative.		How can we build upon our strengths in these capacities, and progress to excellence? Which are most important to develop further, in service of our overall mission? How can we extend learnings here to other capabilities?	
Category	Question	Score	Consensus
2. Strategy	2.3. Do we choose to engage in the right activities to further our organization's mission?	3.00	0.00
2. Strategy	2.4. Can we grow?	2.50	0.50
4. Leadership, Staff and Volunteers	4.2. Do the CEO and leadership team have the experience to be effective?	3.00	0.00
4. Leadership, Staff and Volunteers	4.4. Does the leadership team deliver impact?	2.67	0.33
7. Marketing and Communication	7.2. How well do we build the awareness and reputation of our brand?	3.00	0.00
8. Managing Processes	8.1. Do we have standardized processes that enable our work?	3.00	0.00
Highlighted rows indicate questions that are likely a priority for discussion.			

Figure A.5. OCAT Results Sample

³⁶⁰ See Appendix E for OCAT excerpts for Learning Places and in Chapter Five Part II

APPENDIX E

FINDINGS AND RESULTS

The Historic Tax Credits are only used for commercial or other income-producing buildings or structures. The two maps indicate one of the largest pools of resources, the residential rentals in the USA.

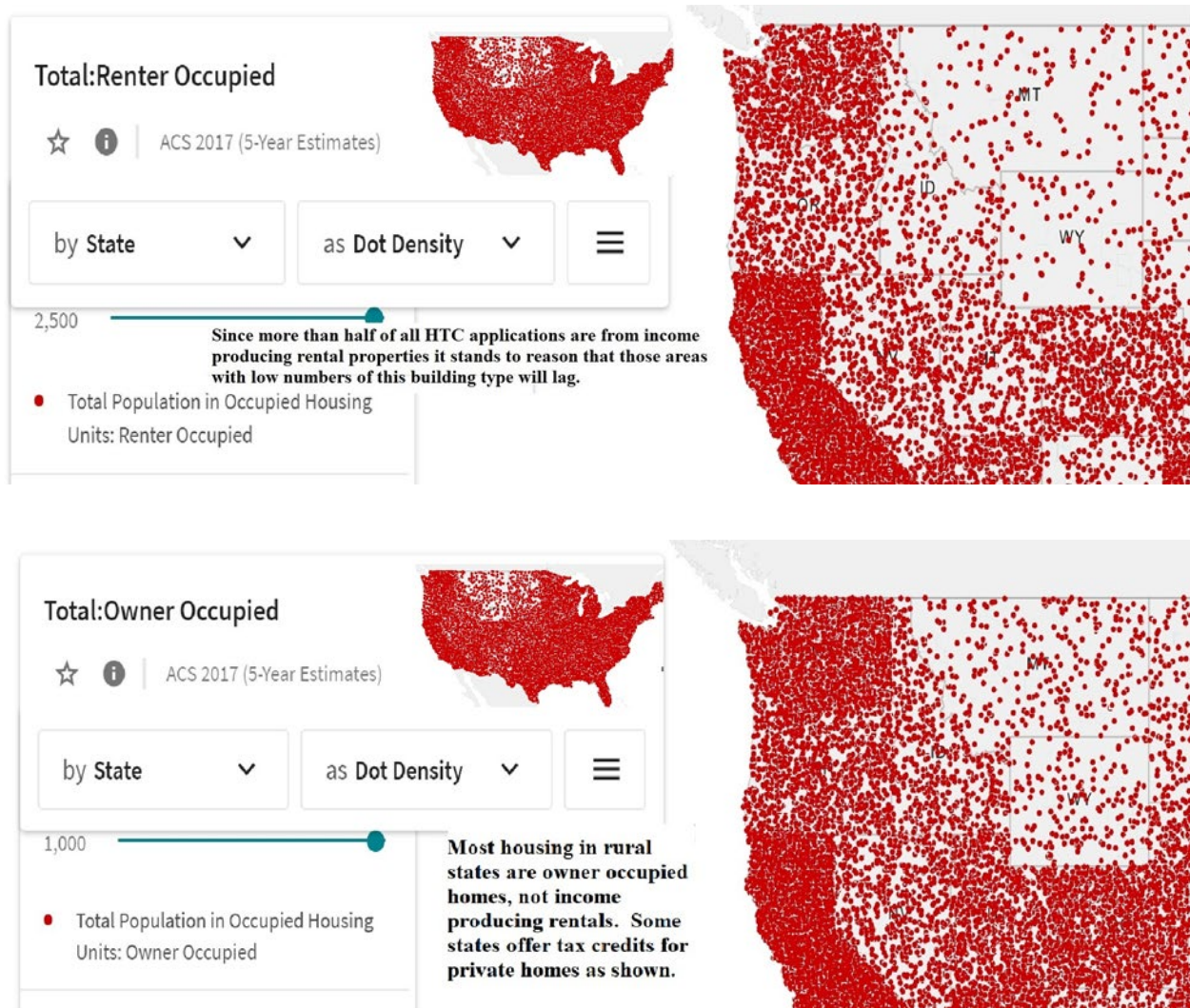


Figure A.6. Residential Rentals and Owner Occupied Maps

There were four weaknesses identified by using the OCAT program functional assessment that could benefit by following the McKinsey formulations for building the organizational capability. There are needs for infrastructure, technology, volunteers, staff, leadership, managing processes, and, most in need, funding. A table shows the results of the scores for each of the essential elements and Prioritize Capacity Report.

ORGANIZATIONAL CAPACITY ASSESSMENT TOOL³⁶¹

Prioritize capacity Results

Where you need improvement: Your organization has a low average score with regard to the following capacities. There is likely a clear need for increased capacity in these areas.

Guiding questions:

What factors led to the development of these shortfalls in capacity?

How can we improve on our capacities in these areas?

How can we incorporate lessons from these areas into future strategy?

Table A.8. McKinsey OCAT Results Capacity Building Needs

Category	Question	Score
4. Leadership, Staff and Volunteers	4.3. How effective are the CEO/ED and leadership team?	2.0
4. Leadership, Staff and Volunteers	4.6. Are the right people on the Board with the right level of engagement?	1.75
4. Leadership, Staff and Volunteers	4.10. How well do we bring in talent?	0.00
3. Funding	3.1. Do we have a sustainable funding model that enables growth?	1.80
3. Funding	3.2. Do we manage our budget effectively?	1.33
8. Managing Processes	8.3. Are our programs adequately staffed and resourced?	2.00
8. Managing Processes	8.4. Do we have the systems in place to execute our programs effectively?	2.00
9. Organization, Infrastructure and Technology	9.3. Do we have technology that enables our work?	2.00

³⁶¹ Casey Foundation. "Marguerite Casey Foundation Organizational Capacity Assessment Tool," n.d. <https://www.google.com/url?sa=t&rct=j&q=&esrc=s&source=web&cd=&ved=2ahUKewj2u8-KycLwAhVTHc0KHYYMECMgQFjABegQIFBAD&url=https%3A%2F%2Fcaseygrants.org%2Fwp-content%2Fuploads%2F2018%2F03%2FOrganizational-Capacity-Assessment-Tool.xls&usg=AOvVaw0WVY-EOkOCEleJ7RGkzqc8>. Original OCAT tool online until 2017 by ©1996-2017 McKinsey & Company

Table A.9. McKinsey OCAT Results

Respondents to your survey assigned the following scores to your organization's capacity levels for each of ten essential elements.

Category	Score	Level
1. Aspirations	3.75	High level of capacity in place
2. Strategy	3.15	Moderate level of capacity in place
3. Funding	1.82	Basic level of capacity in place
4. Leadership, Staff and Volunteers	2.98	Moderate level of capacity in place
5. Values	3.71	High level of capacity in place
6. Learning and Innovation	3.75	High level of capacity in place
7. Marketing and Communication	3.30	High level of capacity in place
8. Managing Processes	2.42	Basic level of capacity in place
9. Organization, Infrastructure and Technology	3.00	Moderate level of capacity in place

Table A.10. The Pre Course by Survey Monkey Summary

Question		Weighted Average			Comment
		Qty.	Skipped	Avg.	
State					
Yr/time					
Cohort					
Question 1		34	0	0.88	
Question 2		22	12	3.55	
Comment		6			27
Question 3		21	13	3.62	
Comment		9			43
Question 4		20	14	3.75	
Comment					
Question 5		20	14	3.55	
Comment		4			20
Question 6		19	15		
					21
					0
					0
Comment					
Question 7		18	16	3.5	
Comment		6			33.3
Question 8		17	17		
					0
					0
					20
Comment		7			41
Question 9		17	17		
				2.18	
				2.13	
Question 10		8	26		
	name	3			37.5
	season	2			25
	need match	0			0
	chose CR	3			37.5
Comment		8			100

The table above and the following ones summarize and graph responses of the thirty-four who accepted the survey and show their completion level. Following the graphs are the multi-

page table containing the collective narratives from those few respondents who took the time to fill out the survey and provide narrative comments.

Table A.11 Post Course Survey Chart Compared with all Survey Monkey Responses

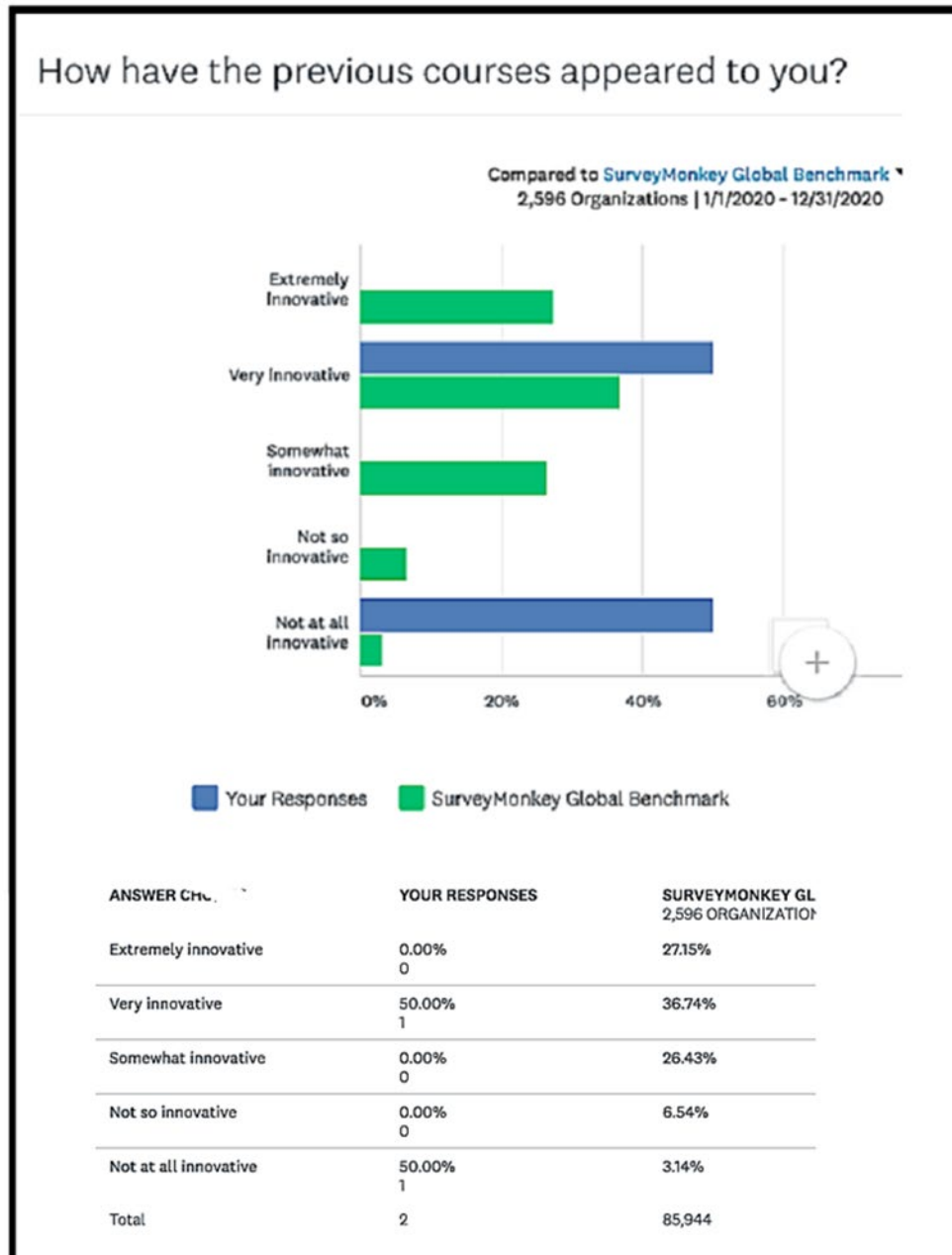


Table A.12. Summary of Pre-Course Survey Answers

Question	Weighted Average				3	5	24	26	27	28	29	30	31	33	34
	Qty.	Skipped	Avg.	Comment											
State					MT	MT	MT	OH	?	?	OH / KY	ID	?	WV	?
Yr/time					2015/2:35m	2015/11m	6/19 8m	8/19 43m	8/19 17m	11/19 13m	12/19 14m	1/20 16m	1/19 3m	1/20 23m	2/20 14m
Cohort									3	5	4 & 5	5	5	5	5
Question 1	34	0	0.88		1	1	1	1	1	1	1	1	1	1	1
Question 2	22	12	3.55		Good	excellent	excellent	Good	Good	Average	Average	Average	Average	Good	Good
Comment	6			27		note 5-2				Notes 28-2	Note 29-2	Note 30-2			
Question 3	21	13	3.62		Excellent	excellent	excellent	Average	Lacks	Good	Good	Good	Good	Excellent	Average
Comment	9			43		note 5-3			>2ways	>2ways	>2ways	>2way	>2way	Note 33-3	Note 34-3
									Note 27-3	Notes 28-3	Note 28-3		Note 31-3		
Question 4	20	14	3.75		Excellent	Good	excellent	On par	On par	Skipped	Good	Good	Excellent	Excellent	On Par
Comment					Note 3-4	Note 5-4			Note 27-4		>2way	>2way		Note 33-4	Note 34-4
											Note 28-4	Note 30-4			
Question 5	20	14	3.55		Several	Several	Never	Read	Several	Several	Several	Several	Extensive	Extensive	Read About
Comment	4			20		note 5-5				Note 28-5	Note 29-5	Note 30-5			
Question 6	19	15													
				21	Good	Good	no opinion	no opinion	good	no opinion	no opinion	Good	no opinion	Excellent	no opinion
				0	Excellent	Excellent	no opinion	Good	Excellent	Good	Excellent	Good	Excellent	no opin.	no opinion
				0	Excellent	no opinion	Good	Good	Excellent	Excellent		Good	Excellent	Excellent	Good
Comment										Note 28-6	Note 29-6				Note 34-6
Question 7	18	16	3.5		Stipend	Stipend	Free	Stipend	Need more Info	Stipend	No donation	Unlikely	Skipped	Stipend	Stipend
Comment	6			33 3	not continue	Will continue		Willing		Willing		Willing		Willing	Not willing
										Nothing		Note 30-7			
Question 8	17	17											Skipped		
				0	mix	mix	mix	mix	mix	Skipped	Mix	some mix		mix	Mix
				0	mix exclusive	mix	mix	mix	mix		Mix	mix		mix	Mix
				20	mix exclusive	mix	Never	mix	non-registered culturally significant.		Mix	mix		Mix	Mix
Comment	7			41	CL, HS, B	B, CL, GT					landscapes	Note 30-8			Note 34-8
Question 9	17	17								Skipped			Skipped		
				2.18	Avg	Avg	Skipped	Avg	Avg		Avg	Avg.		Good	Avg.
				2.13	Avg	Avg	Skipped	Avg	Avg		Avg	Avg.		Avg.	Avg.
Question 10	8	26			Skipped	Skipped	Skipped	Fall	Winter	Skipped	Name & contact information	Name & contact	Skipped	Name & contact	Skipped

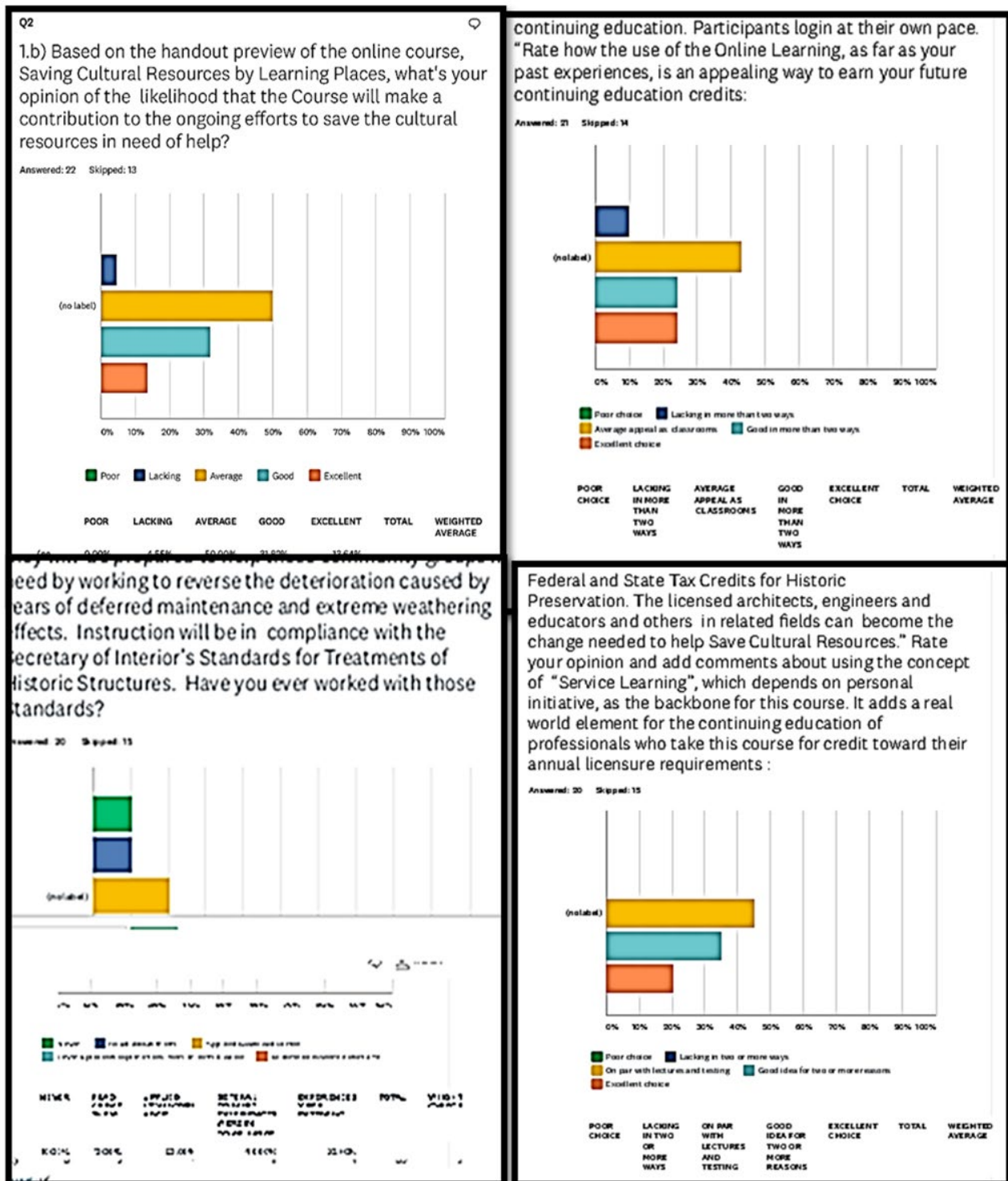


Figure A.7 Pre-Course Survey Results

Table A.13. Change title to Summary of Survey Answers: Pre-Course

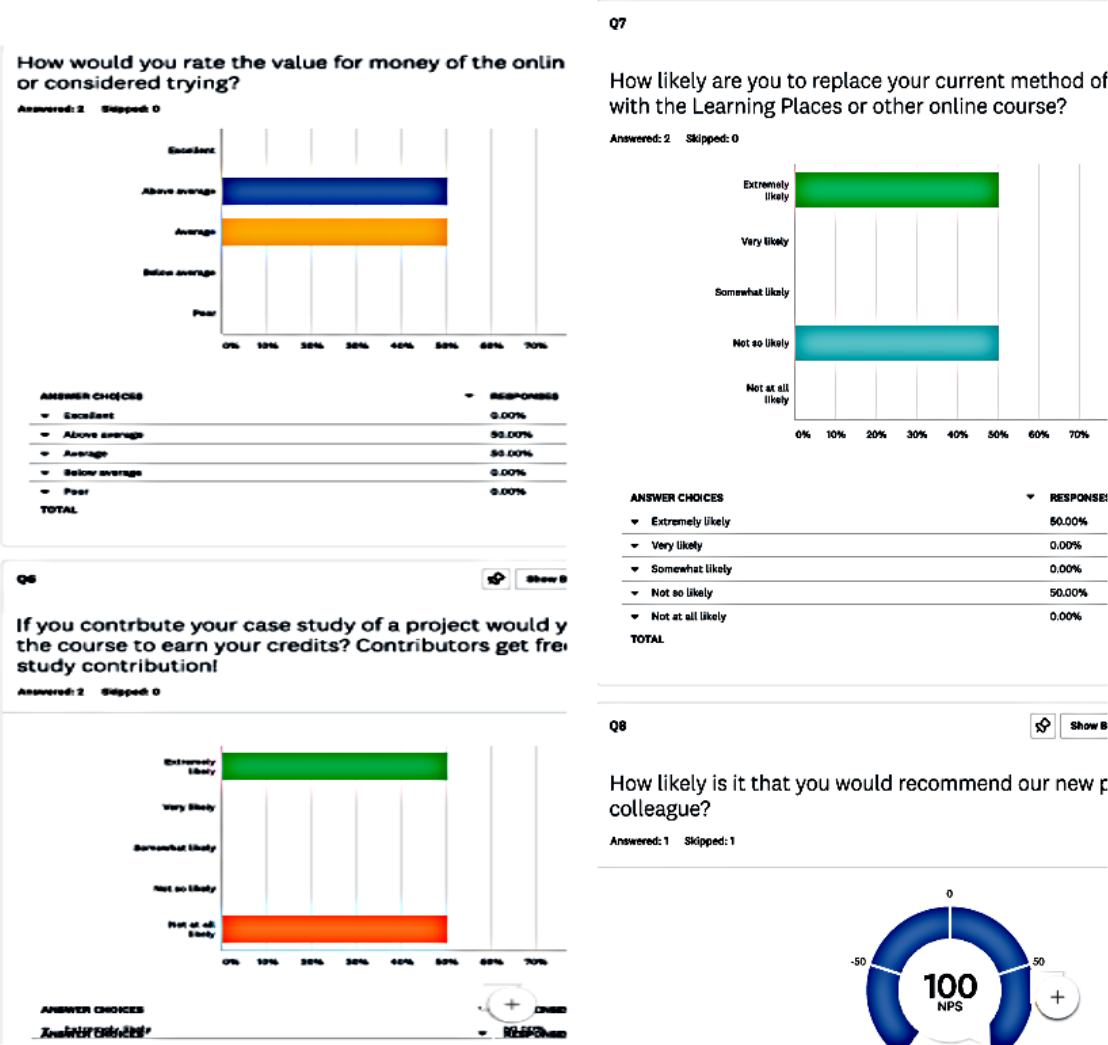


Table A.14. Pre-Course Survey Results Summary

An analysis of the survey results is tabulated to the left of the data set shown above. In addition, the narratives are informative as some of those completing the survey provided their additional comments, see below, followed by charts of the results.

<u>Pre-Course Survey Narrative Responses</u>							
<u>Respondent Numbers and Comment Notes</u>							
<u>#5</u>	<u>#27</u>	<u>#28</u>	<u>#29</u>	<u>#30</u>	<u>#31</u>	<u>#33</u>	<u>#34</u>
<u>Comment</u>	<u>Comment</u>	<u>Comment</u>	<u>Comment</u>	<u>Comment</u>	<u>Comment</u>	<u>Comment</u>	<u>Comment</u>
<u>Note 5-2</u>	<u>Note 27-3</u>	<u>Note 28-2</u>	<u>Note 29-2</u>	<u>Note 30-2</u>	<u>Note 31-3</u>	<u>Note 33-3</u>	<u>Note 34-3</u>
Especially good for self-directed learners	Difficult to interact, collaborate w/ others	Do not know enough about the subject	Depends on the implement--ation of the course.	Have not seen the handout	Convenient @ my own pace	Good pts: flexibility, opportunity to discuss with people from different perspectives	First time no experience
<u>Note 5-3</u>	<u>Note 27-4</u>	<u>Notes 28-3</u>	<u>Note 29-3</u>	<u>Note 30-4</u>		<u>Note 33-4</u>	<u>Note 34-4</u>
Asynchronous helps w/ busy schedule Like hands-on; conversation	An avid community volunteer. Volunteer exchange for AIA CEUs seems valid.	Like hands-on; conversation	Never tried one	I am a volunteer w/ Pres. Org. in ID.		Yes, volunteer experience working w/ Preserv. Alliance of WV.	

	It also might be attractive to emerging professionals seeking credits for licensures.						
<u>Note 28-5</u> Have worked on many	<u>Note 27-10</u> I am ready to join the next session w/ couple of properties	<u>Note 28-5</u> Have worked on many	<u>Note 29-4</u> am a volunteer member of the Salt P. Cave....I have designed one bldg. & 2 additions. Volunteering for credit depends upon who is issuing the credits.	<u>Note 30-5</u> Several projects in compliance			It may or may not be an inducement <u>Note 34-6</u> I am not licensed and have no CE requests. I am also at retirement age, so this is for my personal benefit.

<u>Comment</u>	<u>Comment</u>	<u>Comment</u>	<u>Comment</u>	<u>Comment</u>	<u>Comment</u>	<u>Comment</u>	<u>Comment</u>
#5	#27	#28	#29	#30	#31	#33	#34
Note 5-5		Note 28-6	Note 29-5	Note 30-7		Note 33-10	Note 34-8
It depends on commitment to learning those stds		I am currently a member of two gov't related historic preservation agencies	No bad experiences other than the time to process the application by the SHPOs.	I would like to take the course. I am probably able to donate both time and money. Right now, I am not sure what time or money amounts you are asking me to give. The wording is somewhat confusing.		. I have several potential properties in mind for my community project but will pick one as I learn more about the focus of this course.	Cultural and historic districts areas connected to history somehow, such as ...this area hosted entertainment for Blacks and were the only place they could go in the early 1900s.
			Note 29-6	Note 30-8			
			Have cultural resources already selected likely will pursue 24 credits	Sites w/ tribal, or Nat. Am. Significance farmsteads, cemeteries			

2				Note 30-10		Note 33-10	Note 34-10
				information about what the next session entails --time and monetary commitment would like professional learning units, but I am also generally intrigued by this project		I have several potential properties in mind for my community project but will pick one as I learn more about the focus of this course.	I will search for a property in my area.

The survey question responses were multiple choice with a Likert-like scale for responses, also allowed for individual comments.

Table A.15. Individual Responses to Survey

Pre-Course Survey Individual Responses		
Survey	Source	Individual's Shared Comments
Pre-Course	PM WV	I have several potential properties in mind for my community project but will need to pick one as I learn more about the focus of this course—good points; flexibility, opportunity to discuss with people from different perspectives.
Pre-Course	SC ID	I am an architect and work in facilities at the University of Idaho. I also am involved with the preservation of Idaho, Idaho modern, and the heart of the artboard, working to preserve the 1912 center - Moscow's high school, built-in 1912 being remodeled as an event and community center. I live in Moscow, Idaho. I need more information about what the next session entails - time and monetary commitment. I would like professional learning units, but I am also generally intrigued by this project—sites with tribal or native American significance, farmsteads, cemeteries.
Pre-Course	NJ OH	Great Saltpetre Cave Preserve near Mt. Vernon, Kentucky I am ready to join the next session of the course and have a couple of properties/ communities to potentially work with the Fall session. I am working with Dayton, Ohio Any properties/client that has asked for assistance
Pre-Course ND-KY		I think service-learning is critical to education, as it adds experiential and emotional learning to theory; Cultural as well- historic districts- areas connected to history-this area hosted entertainment for Blacks and were the only place they could go in the early 1900s. I am not licensed and have no CE requirement. I am also at retirement age, so this is for my personal benefit.
Pre-Course		I am an avid community volunteer. Volunteering in exchange for AIA CEUs seems valid. It also might be attractive to emerging professionals seeking credits for licensure.

Survey Question and Answer:

Was historic preservation continuing education a good fit for you? Were you interested in continuing education credits? Reasons for exit from the course prematurely could be due to its time demands. What length, of course, is preferable? Did you have a cultural resource in mind to help save by taking the online course Learning Places? How many online courses have you taken before Learning Places? Would you like to see historic preservation courses continue to be offered online? Select which one of the six modules held more promise to be of most interest or helpfulness for your continuing education needs? Rate your opinion of how Learning Places, the online course, could help your continued preservation actions? Your opinion can be of great assistance for my research for developing Learning Places. Finally, put a star next to your overall rating of the online course, Learning Places. Responses to the Exit Surveys in 2019-20

“I personally had the greatest difficulty with assembling the website. This was due to the fact that I had never done something like that before, not in any way related to the content which I populated it with.”

“Digging deeper into the ‘whys’ and elaborating on the intent of what is written in the nomination form is very helpful. But possibly the most helpful is learning to look at things from another’s point of view.”

Another action taken by community nonprofits was the continued survey of the statewide inventory of one-room schoolhouses by the Preserve Montana (formerly called Montana Preservation Alliance) with funding by several foundations. In addition, book sales of the locally printed and created *Visions and Voices of the One Room Schoolhouses* help the Montana History Foundation offer grants to these rural learning places.

Nationwide, less than 2 % of the 200,000 one-room schools built from 1750-1950 are still active schools. Gallatin County is unique in having at least six structures intact for sixty years

after they stopped acting as schools. That successful outcome took the commitment from those alumni and concerned families in the community.

Besides having taught as a substitute teacher in several county's rural schools, I chose my first online course to be developed at Montana State be "Saving Montana's Cultural Resources: Endangered Rural Schoolhouses." It was a pilot project within a graduate-level educational leadership course to design online courses by Dr. Marilyn Lockhart. My first-year graduate school advisor from the School of Architecture's faculty, Maire O'Neill, recently became a three-time recipient of the Peterson Prize from the NPS. Her supervision of students at MSU produced HABS quality recordation (delineating by hand) of the historical agricultural structures in the valley around MSU. Dr. M. O'Neill provided her feedback on the progress of the online course, as did Dr. Lockhart, other faculty, classmates, and community served as a reviewer. Additional test drives of the online course hosted by D2L by Brightspace were conducted during that Fall until sixteen test results are now reported here in Appendix E. Responses were added to an open-ended question asking for comments for the Pre-Course Survey that are worth noting about the design of online surveys:

Table A.16. From Exit Survey Results

• "The questions confused me at times." • "Survey questions or answers were not always appropriate to me as the survey taker." • "...some questions were confusing without a lot of previous knowledge of the course content. " • "Didn't take long." • Two responded with: "n.a." • "Happy to help, but may not be your target audience." • "I'm happy to participate in future surveys if the feedback is of value to your research."

Table A.17. Annual Post-Course Survey for Follow-up Outcomes

Q1
Would you like to add your project as a case study so others can learn and earn Learning Units?

◀ ▶

Q2
Have you used online learning to gain your required LUs for license renewal or other reasons?

◀ ▶

Q3
How have the previous courses appeared to you?

◀ ▶

Q4
When you think about meeting your need for 12 – 18 (6 LUs and 12 HSW) , do you think of an online course something you need or don't need?

◀ ▶

Q5
How would you rate the value for money of the online courses you have tried or considered trying?

◀ ▶

Q6
If you contribute your case study of a project would you be more likely to use the course to earn your credit subscription per case study contribution?

◀ ▶

Q7
How likely are you to replace your current method of earning LUs and HSWs with the Learning Places or c

◀ ▶

Q8
How likely is it that you would recommend our new product to a friend or colleague?
Respondent skipped this question

◀ ▶

Q9
In your own words, what are the things that you like most about this new prospect for online learning? Could a certificate for 6 LUs and link to an affiliated AIA provider for 12 HSWs per year.
Respondent skipped this question

◀ ▶

Q10
What project are you thinking of contributing to the Learning Places online course? See for yourself what c
at the nonprofit sponsored project: <https://www.cascadianow.org/learning-places>
Respondent skipped this question

◀ ▶

Table A.18. Survey for the 125th Anniversary of Montana State

Respondents	<u>1</u>	<u>2</u>	<u>3</u>
	2016	2016	2016
Question			
1	Faculty/Grad Student	Grad Student	Faculty
2	See Note Below	See Note Below	Skipped
3	Other	Research exhibits	Skipped
4	Telephone Interview	Skipped	Skipped
5	Email address	Email address	Skipped
6	Skipped	Skipped	Skipped
	<u>Note</u>	Note	Note
	HP offered as Course, Service Project, Prof. Practice, Documentation	“Our organization, Montana Preservation Alliance, has sponsored architecture and history students to work with our historic preservation projects and would look to expand that relationship in the future. There are many documentation projects such as historic schoolhouses, barns, rural towns, homesteads, and historic mill buildings that should be conducted to encourage the preservation of these buildings. And there are numerous historic properties for which we now offer hands-on field experience in simple repairs to traditional buildings made of log stone and wood.”	None

The following table includes the Learning Places program; while using as a template, the Baltimore initiative is charting their accomplishments to compare the online Local

Preservation School (LPS).³⁶² The third comparison is provided with the NCPE criteria for certifying member schools.

Table A.19 Comparison of Learning Places Program with the LPS and ACSA/NCPE

	LPS is The Local Preservation School	LP is Learning Places	ACSA / NCPE
1	<u>Introduction</u> The Local Preservation School is a collection of open educational resources for preservation advocates and volunteers. We created this collection to engage and support people interested in learning how to save and sustain historic places within their communities., is intended to reflect our inclusive understanding of the people interested in learning about preservation online.	<u>Introduction</u> Learning Places is an online source of continuing education for architects and anyone wanting to help Save Cultural Resources by Learning Places. A community of learners can learn a core syllabus IDEALS for professionals seeking continuing ed credits, practicing architects, museum, and cultural resource management professionals.	<u>Introduction</u> ACSA has no specific recognition of architectural school HP curriculum. However, an accredited school ought to offer some electives and history of an architecture survey course. As there is no official accreditation body for our field, NCPE serves to ensure that our member programs provide the highest standard of education within our highly multidisciplinary field of study.
2	We sought to build open educational resources that could be used by experienced educators and new learners, volunteers and professionals, people who want to learn online, and even people seeking to learn through in-person experiences.	Two-Year update to be part of the dissertation results and to compare to LPS case study.	• NCPE serves as a peer review body for our field, providing both educational standards and PER – the Journal of Preservation Education & Research [http://www.ncpe.us/publications/].
3			

³⁶² Eli Pousson,, “Local Preservation School,” n.d. <https://localpreservation.github.io/>.

The NPS and National Conference of State Historic Preservation Officers, National Trust were joined by other contributors, including Johns Hopkins University and a host of peer reviewers, to fund an educator’s preservation toolkit online.

	<u>Local Preservation School</u>	<u>Learning Places</u>	<u>ACSA / NCPE</u>
4.	This summary project report seeks to document the outcomes of this work over the past two years and the open-source approach we used to achieve these outcomes. The following sections include: A description of the project outcomes A description of the project website and related online educational resources A list of all educational resources created A summary of “lessons learned.”	Project outcomes in Chapters Five and Six of Dissertation. Online Course Samples List of Resources Created Chapter Three Lessons Learned Summary	What does “being a member of NCPE” mean? Members are academic programs and associate members who meet the Membership Standards [http://www.ncpe.us/standards/] What are the basic academic requirements to join NCPE? The Council expects that all programs will provide instruction in, or require as a prerequisite, the following skills and knowledge deemed common and essential in the field of historic preservation:
5.	PLS has dozens of different organizations (including nonprofits, local government agencies, and state historic preservation officers), individuals including preservation graduate students and public history professors, community association leaders, and neighborhood residents interested in history.	A community of learners can learn a core syllabus IDEALS for professionals seeking continuing ed credits, practicing architects, museum and cultural resource management professionals, city HP officers, nonprofits, university professors, graduate students, local residents 5. Open source: Canvas LMS Google Sites, PowerPoint, Docs,	• Instruction equivalent to at least two (2) courses in the history of the designed environment (including, for example, the history of architecture, urban development, landscape architecture, archaeology, or material culture). • Instruction equivalent to at least one (1) course devoted to the history and theory of preservation. • Instruction equivalent to at least one (1) course devoted to

	<u>Local Preservation School</u>	<u>Learning Places</u>	<u>ACSA / NCPE</u>
6.	Open-source projects and open resources. These projects and their creators include: Jekyll was created by Tom Preston-Werner and Jekyll contributors Minimal Mistakes theme created by Michael Rose Reveal.js created by Hakim El Hattab Carol M. Highsmith Archive created by photographer Carol M. Highsmith and made available by the Library of Congress Learning Circles Facilitator's Guide created by Peer 2 Peer University	Word, Video, Spreadsheets Hyperlinks to NPS.gov How to Lessons NTHP Links to HPEF. Learning Places does not offer a history of architecture, for instance. LP recognizes learners' prior preparation for the curriculum in three ways, known as TPK: technology-aided courses; attitude toward andragogy for leadership in community-based projects; prior knowledge of cultural resources and specifically HP.	Documentation and recording techniques used in preservation and archeology. • Since preservation required the field application of knowledge, including communication skills, the program should encourage a significant period of practical experience, equivalent to an internship, practicum, or apprenticeship. • Instruction in at least one Specialized Component (design, technology, economics, law, planning, and curation). • Full Members Degree-granting programs: - o UG / G - o Other degrees with a historic preservation emphasis • Associate Members - o Certificate programs
7.			

<u>Local Preservation School</u>	<u>Learning Places</u>	<u>ACSA / NCPE</u>
The project directly engaged approximately three hundred individual preservation professionals and volunteers through fourteen in-person classes and workshops and reached over 2,600 individual web users through the main Local Preservation School website. Between October 2015 and February 2017, LPS sought to engage local preservation advocates in several different ways, including: ● An email newsletter ● A project website ● Social media: ○ @localpast Twitter account ○ #localpast Twitter hashtag ○ Saving Places Facebook group ○ Bmore Historic Facebook group ○ Historic Preservation Reddit group ● Conferences and presentations: ○ OpenLab Workshop, Crystal City, VA ○ NCPH THATCamp unconference, Baltimore,	Theory of preservation is presented in the unique syllabus IDEALS D is for Documentation, the second module. Learning Places is a hybrid course for community-based Voluntarism by service learners. L is for Learn, then Lead a module in the core curriculum Learning Places offers extra credit for specialized modules in cultural landscape resource preservation and extra credit courses through the HPEF as an approved provider of the AIA online university. Learning Places grants a certificate of completion for 6 LUs for reporting to AIA and access to HPEF for AIA provider HSW credits. 6. AIA/MT and AIA/HRC were approached, and MSU SOA and CLS Departments.	Other non-degree-granting programs that offer training or education in Historic Preservation

	<u>Local Preservation School</u>	Reached out to 300 local architects and 6900 online HRC subscribers. March 2019-2021 <u>Learning Places</u> 7. Emails directly to AIA/MT members; AIA/MT newsletter articles; Posts to AIA/HRC on the AIA Knowledge Community website. Canvas LMS Open Source Nonprofit sponsor CN! website Facebook Page On and Off-Campus pilot program demonstration via D2L platform for trial before launch as a Face-to-Face demo. Google Blogspot Google Site	
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Attitudinal Changes

Regarding the attitudinal changes, some forces or tendencies influence these factors; see Record of Narratives from interviews. Attitudes and attitudinal change are more likely to be revealed in print, periodicals, journals, annual government reports of highlights, interviews, and multi-channel electronic posts. If this indicates that the equal number of pro and con responses from a sample size of two dozen local interviewees could be extrapolated throughout my thousands of observations, it probably will not remain a fifty-fifty split.

One of the online course outcomes for service learners was the change in attitudes about joining local preservation efforts already underway.

The Architect's Responsibility

An architect honored by a commission to work on an historic building, must recognize that an historic building is a cultural artifact and as such the architect's responsibility to that artifact and to society supercede their primary responsibility to their client. Another way to look at it is that the artifact is the client and the owner is a trustee.

That the health and welfare of society comes before the wishes and dictates of the owner has been long established. This concept has generally been supported relative to code and other statutory requirements even with new construction to protect society from irresponsible and dangerous constructions.

While there is no specific statute or standard contract language requiring an architect to accept this responsibility for historic structures; courts have generally accepted that historic structures are the visual moorings for a stable society. This along with the recognition of historic structures and other museum objects as the defining elements of our culture, place the preservation of them within the health and welfare of society established within the U.S. Constitution [this is the legal basis for historic district regulations etc.]

Figure A.8. Past President of the AIA Carl Elefante

(Chapter Five-Part III.1)

Because tax credit applications could add services to the financial consulting side, they offer their knowledge and competency to clients as a value-add that differentiates them from their competition. Unfortunately, the same question posed to architects did not get the same response most of the time. Therefore, the question posed to owners has been tabulated along with those from more or less knowledgeable architects and included in the Table below.

The rows below the demographic and socio-economic factors are all about the preservation activity measured at this time. Just as the population is changing, these numbers will also grow, and hopefully, none of these factors will be reduced because that would mean an abrogation of the stewardship of historic places has occurred. Reexamining these numbers over time will help

track via trending lines. That is why I had established these and other tables to mark a baseline when Learning Places commenced its program, and its graduates added their voluntarism to civil society's stewardship of cultural resources.

Table A.20. Number of Schools of Architecture and HP Activity per State

FACTORS	WA	OR	ID	MT	UT	WY	CO	NV
Pop.	7405743	4142776	1716943	1050493	3101833	579315	5607154	2998035
Change	8%	7%	7%	5%	10%	4%	10%	9%
Permits	44077	19586	12165	4781	22662	1727	38974	17952
Threat	0	0	1	12	3	1	5	1
CLG	60	55	39	17	97	21	66	6
CLG								
PERCAPITA	123429	75323	44024	61793	31977	27586	84956	499672
SAT	\$ 11m	\$ 4m	3m	5m	1m	1m	9m	8m
HPF	\$46m	\$31m	\$27m	\$32m	\$29m	\$25m	\$36m	\$26m
HTC \$	\$892M	\$866M	\$25M	\$59M	\$217m	\$22M	\$312m	\$51M
HTC completed	109	120	13	47	87	19 16	85	6 2
HTC application*	261	284	56	147	221	44	349	13
Colleges	CERT., UW	M. ARCH., UO	0	0	MA, UT	MA.M S. UW		0

NR	1571	2040	1041	1191	1841	560	1583	382
NHL / NHA	24	17	10	28	16	27	28	9
WHS	1	0	1	2		1	1	0
HABS	833	533	382	542	679	551	929	428
TRAILS	1	3	2	1	4	4	5	4
TOTAL PTS.	20	23	44	34	25	32	25	51
<u>SCORE</u>	<u>1</u>	<u>2</u>	<u>7</u>	<u>6</u>	<u>4</u>	<u>5</u>	<u>3</u>	<u>8</u>
	WA	OR	ID	MT	UT	WY	CO	NV

Table A.21. Architects in Study Area and GDP / HTC

State		Licensed Architect		Resident Architect		% of USA architects	New Grads	NR List	HTC Projects in \$m	GDP \$ Bns.	GDP / Capita \$K
1	WA	6764	5.88%	4056	59.96%	4%	193	1557	857	610	80
2	CO	7804	6.79%	3668	47.00%	3%	158	1558	537	396	69
3	OR	3588	3.12%	1471	41.00%	1%	124	2040	781	255	61
4	NV	2735	2.38%	547	20.00%	<1%	21	382	50	180	59
5	UT	2646	2.30%	926	35.00%	1%	39	1841	40	192	60
6	ID	1882	1.64%	527	28.00%	<1%	21	1041	13	82	46
7	MT	1481	1.29%	459	30.99%	<1%	27	1181	26	53	50
8	WY	1225	1.07%	135	11.02%	<1%	3	560	21	40	69
Total %		28125	24.46	11789	41.92%	10%	586	10160	2325	1808	
1 UK/Cls									1250	3000	43

Table A.22. Online Activity on Learning Places: The Bounce Factor

Learning Places Online Data Collection of Attendance Statistics: aka Bounce Table			
	Lowest Rank	Midrange Rank	Higher Rank
Number of Learners	6	4	3
Score per learner	5, 8, 9, 12, 13, 14	13,17,17,18	15, 16, 18, 21
Time online in Course	Less than 4 minutes Online in the course	Less than 35 minutes	1 hour to many hours
Pages viewed	< 11 pages viewed	Under 50 pgs.	60 to 220 avg. 120
Known Ed Level	Educated	Unknown	>1-year HP avg.
Geography	Rural	Unknown	Unknown
Genders	4 m, 2 f	15 m /15 f	Unknown
Age estimate	>50 yr; one m.>60 yr.		>60 yr.
Online Prepared	Email, social media	No online presence; 1 social media	2 of 4 had Blogs
HP prepared	Unknown to None		1 yr. + avg.
Licensed Architect	One known of six	3 of 4	unknown
Total minutes / pages	Score 61 cumulative. Est. .5 hr. / <50 pgs.	Score: 65 cumulative Est. 2 hr. / 70 pgs.	Score 70 cumulative Est. 4 + hours
Summary: 13 bounced from the course early included in the above table; four were licensed architects; two were at architectural schools as administrators. As an instructor, I made an average of 8 communications per student. Thus, 35+ of 40+ enrollees were unknown to the researcher.			

Table A.23. Commercial Property Inventory of Study Area

Commercial Property Inventory														
	2014				2014-20 Changes in Numbers				2020				Change in \$ Value	
	Rank	#/k	\$ mm Avg	#/k >\$5mm	Change #	% Change #	Change # >\$5mm	% Change #>\$5 mm	RANK	#/k	\$mm Avg.	#> \$5mm	Change \$ Avg	% Change \$ Avg
WA	1	182	1.5	2.8	-19	-10%	10	357%	1	163	2.2	12.8	0.7	47%
OR	2	135	1.2	5.3	15	11%	4.2	79%	2	150	1.8	9.5	0.6	50%
CO	3	115	1.7	6.3	7	6%	4.9	78%	3	122	3.1	11.2	1.4	82%
UT	4	69	0.94	2.3	-8	-12%	2.2	96%	5	61	2.1	4.5	1.16	123%
MT	5	49	0.47	0.64	29	59%	0.33	52%	4	78	0.45	0.97	-0.02	-4%
ID	6	47	0.48	0.53	6	13%	0.77	145%	6	53	0.75	1.3	0.27	56%
NV	7	40	2.3	2.9	0	0%	1.4	48%	7	40	3.6	4.3	1.3	57%
WY	8	21	0.61	0.3	0	0%	0.1	33%	8	21	0.79	0.4	0.18	30%
Avg study		82	1.15	3	4	5%	3.0	111%		86	1.85	6	0.70	55%
Sum Study		658		21	30		24			688		45		
USA Total		8003	1.3	317	683	9%	125	39%		8686	1.7	442	40%	31%
Study % USA		8%								8%				

Numbers in the thousands and dollars in the millions; cited: SMR

Observations: For instance, the average results for the eight-state study area reveals:

1. 82000 buildings increased to 86000, averaging a 5% increase per state
2. MT led the others with 59%.
3. The average value went up from \$1.15 million to \$1.85 mm.
4. The number of buildings over \$5m increased 111% from an average of 3000 to 6000 by rounding up.
5. With WA leading the others with ten more buildings >\$5mm or 357% increase

Commercial Property Inventory Analysis

- a. Montana has constructed more buildings placing at fourth, and Utah has lost buildings placing it fifth
- b. WA and Utah had a net loss in the number of buildings.
- c. The USA had an increase of 9% number of commercial buildings, and the study area had a net loss of -7%.
- d. Montana led the study area with the number of commercial building changes of 59%
- e. The USA had an average increase of 31% in value in Dollars, and the study area had 55%
- f. Utah had the highest rate of increased \$ value, with Colorado second. Only Montana showed a loss
- g. Washington had the greatest change in the number of buildings valued above \$5million
- h. There are eight states of the 51 actively listed on the NR and HTC projects, or 16%
- i. By 2020, the study area has 688000 commercial buildings of the 8686000 in the USA or 8% Eligible for the NR
- j. There are 90000 listings in the National Register of those 8,686,000 nationwide or 1.4 %
- k. There are 10319 listed NR and NHL on the National Register of those 688,000 from the study area or 1.5%
- b. L. Not all of the commercial buildings are eligible because of the 50-year rule. However, studies have shown that most buildings are over fifty years old.
- a. The NR listings in the study area 10319 are 12% of the total 90000 nationwide, and > 8% (for the # Buildings in the study area: national).

Behavioral / Cultural Factors

Table A.24. Matrix of Factors Affecting Behavior Aligned with HTC Use

	Matrix of Factors Affecting Behavior Aligned with HIT C Use																		
States	Dependency		Dependency		Rank		Taxes		Taxes		Rating		Overall		Financial		financial		Cumulative
RANK	on Federal \$		on Federal \$		USA		State		Burden		Income/ Tax		tax		Literacy		Knowledge &		Financial
	Residents		State Gov't		Overall		%		total		%		rating		Score		Education Rank		Rating
		rank		rank		rank		rank		rank		rank		rank		rank		rank	
WA	37	2	37	1	42	2	8.32	5	8.39	3	7.32	5	3.00		61.45	3	28	4	2.33
OR	27	4	27	6	25	6	8.34	4	8.34	5	9.09	1	4.33		59.79	5	29	5	4.28
NV	36	3	29	5	31	4	8.39	3	8.39	4	4.31	7	4.33		57.79	8	35	6	5.93
MT	14	8	2	7	5	8	7.22	7	7.22	7	7.28	6	7.17		60.51	4	37	7	5.80
ID	21	7	35	2	26	5	7.93	6	7.93	6	7.64	3	4.83		59.01	6	26	3	4.87
CO	40	1	32	4	37	3	8.4	2	8.4	2	7.58	4	2.67		64.3	2	16	2	2.41
WY	24	5	1	8	10	7	6.47	8	6.47	8		8	7.33		58.78	7	42	8	7.59
UT	21	6	35	3	46	1	8.75	1	8.75	1	7.93	2	2.33		67.97	1	1	1	2.26

Theory One from Table E-23 above: States with a higher tax burden will be more likely to have more owners apply for rehab tax credits of an NR-listed property, especially if the State matches federal incentives. The best-rated states for this theory: UT, WA, CO.

Theory Two from the Table above: The states that are least dependent on federal funding for its residents and state government is Indicative of higher income levels and more likely to apply for HTC. The states with the least dependencies are UT, WA, CO.

Theory Three from the Table above: Concerns a state with higher environmental support, i.e., the property owner may be more amenable to using tax credit programs. The state with more greening projects and awareness is Oregon, Wash., CO

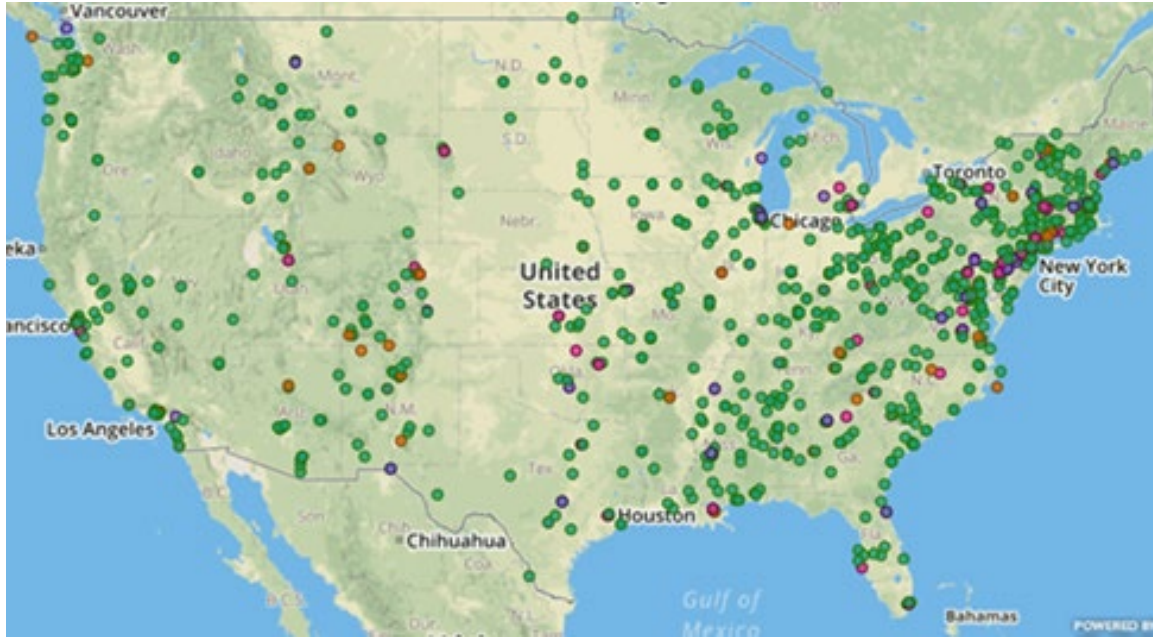


Figure A.9. Story Map Locations in the United States

Rapid Ethnographic Assessment Procedures

The following table contains the remaining procedures that followed the REAP methods for data gathering of observations and insights from participants. These are also the tabulation of methods used under REAP as reported in Chapter Five Findings and Results. REAP can help the researcher learn more about the actual context for historic preservation in a study area. For example, the intervention called Learning Places uses an online learning management system by Canvas that assisted with tracking the observations of the users while logged into the course.

It may be beneficial to repeat the quote from previous chapters, from the UNM professor Chris Wilson, those using Setha Low's methods while engaged in the REAP only need to use three types of observations to triangulate their subjects in a study.

Table A.25. REAP Methods and Results

Rapid Ethnographic Assessment Procedures (REAP)				
<u>METHOD</u>	DATA	PRODUCT	WHAT CAN BE LEARNED	WHAT WAS LEARNED
Historical and archival documents	News clips, book collections, articles, notes, lectures, photos,	People’s history of relating to surrounding communities	Historical context for the current study and saving cultural resource planning	Antecedents to preservation actions, who, what, where and when and why cultural resources were saved and why others were lost.
Physical traces mapping	Historic Tours of Gallatin County; onsite at NR and NHL sites	Exemplar of cases-in-point for final reports. Mapped boom and bust and town building phases locally	Settlement patterns and growth spurts mapped, and charts prepared for historic periods—traditional. Lost ways of life era for first occupants who dwelled within the local cultural landscape	Punctuated episodic growth spurts occur, and traces of prior occupation are indelible on the landscape. Tepee rings, ghost towns, and prior documentation of early settlements are visited, and stories gathered of historical geography
Behavioral Maps	Time spent maps of sites narratives in the field	Twelve thousand years of local occupation with the land and the tenure of different keystone predator-prey relationships. Recent town-building growth, railroad route selections were measured in phases of development; significant episodes.	Stories of prior ways of life and adaptation to the food sources; waterways; town building; military occupation; mineral and timber extraction.	Cultural activities can be identified with special places of hunting and gathering, exploration, discovery, and prospecting. Animal trails and cross-country hunting trails, and paths of communication and trade mapped and updated

Individual and Key Informant Interviews	Notes were taken, and sheets or notebooks are archived. Recorded conversations, interviews, onsite imagery videotaped/photo graphed. Transcriptions are indexed and copied.	Completed transcriptions of interviews and the pre-interview notes and questions are copied and archived remotely	Patterns of commonly known site characteristics can be verified and compared for agreement or contrasting POV. Educational values of shared information.	Informants supplied critical tips for revisions to online course design. Site narratives provide all online learners with an understanding of their chosen sites. Shared images and NR nomination justifications provide cohorts of learners with comparative cases-in-point. Final reports capture the past interview transcription highlights.
Focus Groups	Notes were taken, and sheets or notebooks are archived. Recorded conversations, interviews, onsite imagery videotaped/photo graphed. Transcriptions are indexed and copied.	Users provide feedback on the preferred length of course time, favorite modules; timed usage data; what future courses ought to cover.	Those with more diverse points of view may reveal conflicting perspectives and concerns about the online course and the prospective help for cultural resources. Success inspires	Different users shared what mattered most to their chosen cultural resources. Requests for grants to fund the implementation of needed preservation treatments followed the interviews.
Observe Participant	Field notes and video / photographic recordings onsite for historic sites with community informants.	Socio-cultural information for contexts of each chosen cultural resource for local tours, grants, and publication research	Communities share their stories offering contexts for those who want to learn more about their local environment and historic events. In addition, concerns for	Both historic property owners and the community at large as tour participants create a communal space for sharing stories of the past. The observer of these interactions can discern a potential for future preservation educational actions. In addition, more community

			the future preservation of the historic properties is shared with interested parties, government grantors.	participants' opinions and likes/dislikes are shared for planning preservation educational outreach in the locality.
Observe participant Online	Online users are tracked by course analytics for quantifiable data and Qualitative data such as narratives, assessment feedback.	Background information of the online learners' chosen sites and the reasons for selecting these NR-listed properties.	The significance of the place can be revealed by past uses of the chosen property and its current activity of visitors. Concerns for these places are presented online for feedback from instructors and peers in the cohort.	While online, the user can be observed sharing their backgrounds with others; receive feedback; ask questions about the others' work. Rotation of the service learners can emulate a moderator. The instructor observes all, responds to completed work, looking for the cognitive presence brought to the online space in the virtual community.

The main categories are presented in column one and the observations in column two. The main headings in column one and an explanation are provided below. The full spreadsheet appears in Appendix E

- Museum, et al.: lists observation from cultural institutions,
- Parks and Monuments: lists observation from federal land management agencies,
- Historic Preservation Tours: six local tours by the county preservation board
- Nonprofits: local and state foundations, grantmakers, community and preservation groups.
- Private Property Owners: their related examples of responses per building type.
- Professionals in Practice: primarily architects, state staff, code enforcement officials
- University: educators, architecture faculty, extended university, extension service.

A complete list and quantities follow in Table A.26:

Table A.26. Interviewee and Contact List

<u>List of Interviewees 2013-2020</u>			
	<u>Type</u>	<u>Name</u>	<u>Count</u>
1	<u>Museums</u>		38
		Gallatin history museum for social entrepreneurship	
		Montana historical society, Cody museum	2
		MOR, Tinsley Farm, Livingston, West Yell,	3
		Depots, Livingston, West Yell, Three Forks, Bozeman	
		Three Forks, Manhattan Headwaters Park	5
		Little Bear School, Lone Butte, Bridger, Dry Creek	
		Great Falls, L& C, and local Deer Lodge Agricultural	
		Whitehall, Red Lodge, Marcus Daly, Greybull, WY	
		Yellowstone, Glacier, Tetons, Grant-Kohrs Ranch	
2	<u>Historic Sites</u>		14
		Virginia City, Nevada City; County Fairgrounds, Gallatin	
		Gateway communities to parks: Livingston, West Yell.,	
		Gardiner, Jackson, Cody, and others.	
3	<u>Nonprofits</u>		58
		Montana History Foundation; MPA	
		Western Lands and People.	
		Montana Cooperative Development Center	
		Extension Service, Community Development	1
		Grants coordinator for County board:	2
		Theaters in Bozeman, Deer Lodge,	
		Great Falls Arts CMR	3
4	<u>Insurance Industry</u>		350
		Field reports rental residences and businesses in	
		historic districts	
5	<u>States & Local Staff</u>		10
		CLG staff., City Planning	
		NCOD review and 2020 plan; School Board.	
6	<u>University</u>		36
		MSU ATO and Foundation; University Architect	4
		Educators; Adult Continuing Education	16
7	<u>County Preservation Tours</u>		600
		Docent Assignments: Gallatin Gateway; Manhattan;	
		Three Forks; Springhill; Fort Ellis Willow Creek;	
	<u>Total</u>		<u>1106</u>

Historic Preservation Fund Grants for Twenty Years Chapter Five Part Iii.1 (Chapter Five Part III.1)

Critically comparing the past two decades (half the lifetime of the federal HTC) and HPF grants in aid for preservation projects enabled a tabulation for the Findings and Results Chapter Five. Comparison of twenty years of preservation activity in each study area's eight states completes the following dataset that lists all of the HPF aid to the states. In addition, the constant comparison method allows the generation of a relative ranking of the eight states in the study area:

Table A.27. Grants Per State for Training by NPS NCPTT 1995-1997

GRANT PURPOSE	YEAR	WA	CO	MT	OR	UT	NV	ID	WY	ST.	\$	TYPE
Preservation Training	1995	35								WA	\$35	NCPTT
Preservation Training	1996						\$40			NV	\$40	NCPTT
Preservation Training	1996		\$40							CO	\$40	NCPTT
Preservation Training	1997									OR	\$24	NCPTT
Preservation Training	1997								\$36	WY	\$36	NCPTT
Preservation Training	1997						\$23			NV	\$23	NCPTT
Subt. pre 99		\$35	\$40				\$63		\$36		\$198	

Twenty years of HPF grants to states in study area data sets

Table 28 Total Grants Awards Study Area States over 20 Years of HPF

<u>GRANT PURPOSE</u>	YR.	WA	CO	MT	OR	UT	NV	ID	WY	STATES
Preservation Training	1999	63								WA
Green Mtn. Lookout	1999	104								WA
Tacoma Art	1999	1600								WA
Liberty Thtr	1999				800					OR
ID Reactor	1999							640		ID
Promontory	1999					100				UT
SAJU Mining	1999		130							CO
Telluride Bank	1999		611							CO
Comstock	1999						862			NV
Museum	1999						1280			NV
Stewart	1999						847			NV
1999 Subtotal	1999									\$7,037
Mukai Farm	2000	300								WA
Nat. Orr Home	2000	500								WA
Murie Ranch	2000								610	WY
Mesa Verde	2000		3000							CO
SW Collections	2000		360							CO
Opera	2000						1200			NV
2000 Subtotal	2000									\$5,970
Pt Townsend	2001	300								WA
Ft. Nisqually Coll.	2001	277								WA
Grays Harbor Court	2001	1600								WA
Bremerton Theater	2001	800								WA
Vista House	2001				560					OR
Public Archives Bldg.	2001			189						MT
10th St. Bridge	2001			500						MT
Virginia City	2001			600						MT
Butte Archives	2001			189						MT
Preservation Training	2001			40						MT
Ogden RR	2001					452				UT
Mus. Americas.	2001		342							CO
MEVE Collections	2001		713							CO
Yellowjacket Coll.	2001		65							CO
2001 Subtotal	2001									\$6,627
Tugboat A Foss	2002	310								WA

Ft. Nisqually Coll.	2002	277								WA
GRANT PURPOSE	YR.	WA	CO	MT	OR	UT	NV	ID	WY	STATES
Albany Quad.	2002				500					OR
Key Mill.	2002							442		ID
Carey Act Maps	2002							73		ID
Moss Mansion	2002			90						MT
Spg. City School	2002					200				UT
YNP. Collect.	2002		120							CO
Montrose	2002		496							CO
2002 Subtotal	2002									\$2,508
Fox Theater	2003	64								WA
PT. Angeles Lib.	2003	1200								WA
Spokane	2003	750								WA
Ozette Coll.	2003	152								WA
Tillamook Hangar	2003				453					OR
Livingston Depot	2003			596						MT
Billings	2003			65						MT
Story Mansion	2003			1240						MT
WW II 7th F.Grp	2003			175						MT
Daly Mansion,	2003			596						MT
Naropa Coll.	2003		100							CO
School	2003						436			NV
Walking Box Ranch	2003						543			NV
2003 Subtotal	2003									\$6,370
Preservation Training	2004		37							CO
Preservation Training	2004					40				UT
Preservation Training	2004		9							CO
Astoria, maps	2004							714		ID
Madison Court.	2004			673						MT
2004 Subtotal	2004									\$1,473
Eric Ladd Coll.	2005				591					OR
UP Dining Lodge	2005			673						MT
L. Oswego Iron Smelter	2005			837						MT
Bremerton Muse.	2005	600								MT
Preservation Training	2005			40						MT
Vernon Collection	2005								200	WY
Elitch Gardens	2005		1800							CO

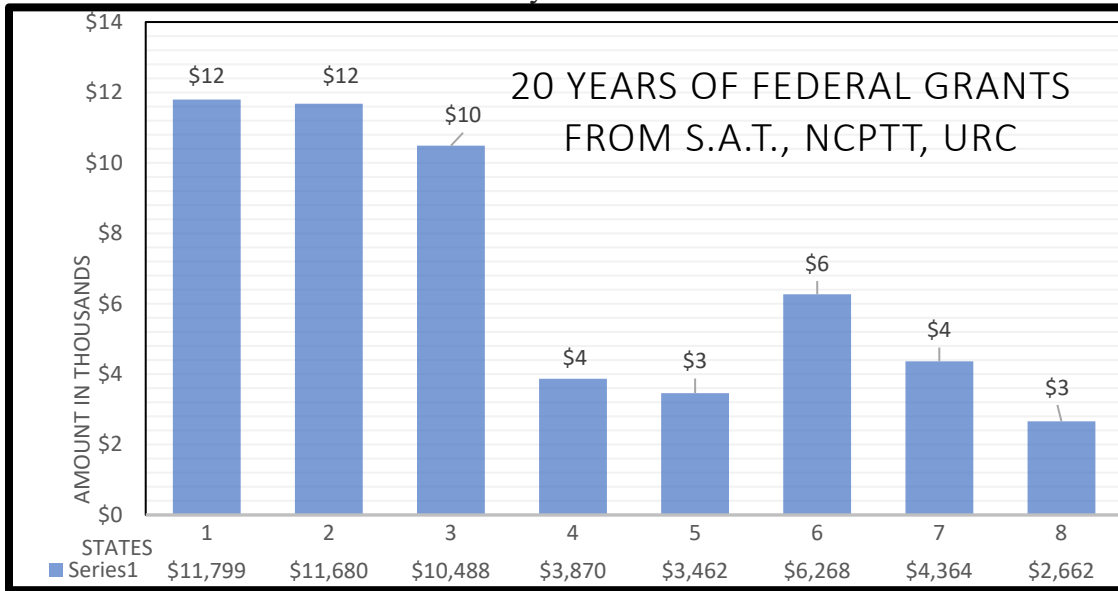
Pueblo Steel	2005		454							CO
Pantages Thtr. Tacoma	2005	296								WA
Las Vegas P.O.	2005						1100			NV
GRANT PURPOSE	YR.	WA	CO	MT	OR	UT	NV	ID	WY	STATES
2005 Subtotal	2005									\$6,591
Olympic Stad.	2006	297								WA
KMC Museum	2006				458					OR
Ft. Nisqually Muse.	2006	260								MT
Missoula Art	2006			794						MT
Anaconda Crths.	2006			1600						MT
Puebloan Sites	2006					510				UT
Weir	2006					360				UT
Sheridan	2006								891	WY
Montrose	2006		197							CO
CO Fuel & Iron	2006		600							CO
Georgetown	2006		403							CO
Still Museum	2006		150							CO
2006 Subtotal	2006									\$6,520
Orcas Museum	2007	\$100								WA
Coeur D'Alene Parks	2007							\$508		ID
Preservation Training	2007		\$56							CO
Chimney Rock	2007		\$440							CO
2007 Subtotal	2007									\$1,104
Chapel	2008	\$360								WA
Wilson Theater	2008							\$394		ID
Chesterfield	2008							\$642		ID
Bannack Bldg. Stab.	2008			\$390						MT
Anthrop. Collection	2008					\$1,000				UT
State Collections	2008					\$500				UT
Paul Dyck Buff. Cult.	2008								\$700	WY
Hutchinson Ranch	2008		\$520							CO
2008 Subtotal	2008									\$4,506
Mason Court	2009	\$200								WA
Westwood Theater	2009							\$300		ID
Havre P.O. Court	2009			\$200						MT
2009 Subtotal	2009									\$700
Schooner Advent,	2010	\$180								WA

Makah Guide	2018									WA
Ft. Worden	2018	\$500								WA
Seattle Gaslight	2018	\$500								WA
Timberline	2018				\$25					OR
Lodge	2018				\$394					OR
Snake River	2018							\$172		ID
GRANT PURPOSE	YR.	WA	CO	MT	OR	UT	NV	ID	WY	STATES
Va. City Grace Church	2018			\$200						MT
Univ. WY. Coll.	2018								\$261	WY
Tabor Opera	2018		\$500							CO
CO. Spgs. Conserve.	2018									CO
2018 Subtotal	2018									\$2,552
Pasco Afro study	2019									WA
Afro. Heritage Ph. 3	2019									MT
Latinx	2019									UT
Table 4 TWENTY YEAR DATA		WA	CO	MT	OR	UT	NV	ID	WY	

Table A.29. Chart of HPF Grants Per State of Study Area

TOTALS PER STATE AND FOR THE STUDY AREA FOR TWENTY YEARS HPF								
1. WA	2. CO	3. MT	4. OR	5. UT	6. NV	7. ID	8. WY	TOTAL
\$11,799	\$11,680	\$10,488	\$3,870	\$3,462	\$6,268	\$4,364	\$2,662	\$54,593
\$46,000	\$36,000	\$32,000	\$31,000	\$29,000	\$26,000	\$27,000	\$25,000	\$252,000
\$57,799	\$47,680	\$42,488	\$34,870	\$32,462	\$32,268	\$31,364	\$27,662	\$249,654

Figure A.10. A10 20 Years of Grants for Study Area



Montana Historic Tax Credit Data for 2001–2020

Sample PDF below shows Montana Historic Tax Credit Data for 2001–2020. Similar maps and results for all eight states in the study area (and the rest of the United States results and maps for comparisons) can be found via this link:

<https://forum.savingplaces.org/viewdocument/historic-tax-credit>

Figure A.11. A11 HTC MT Map

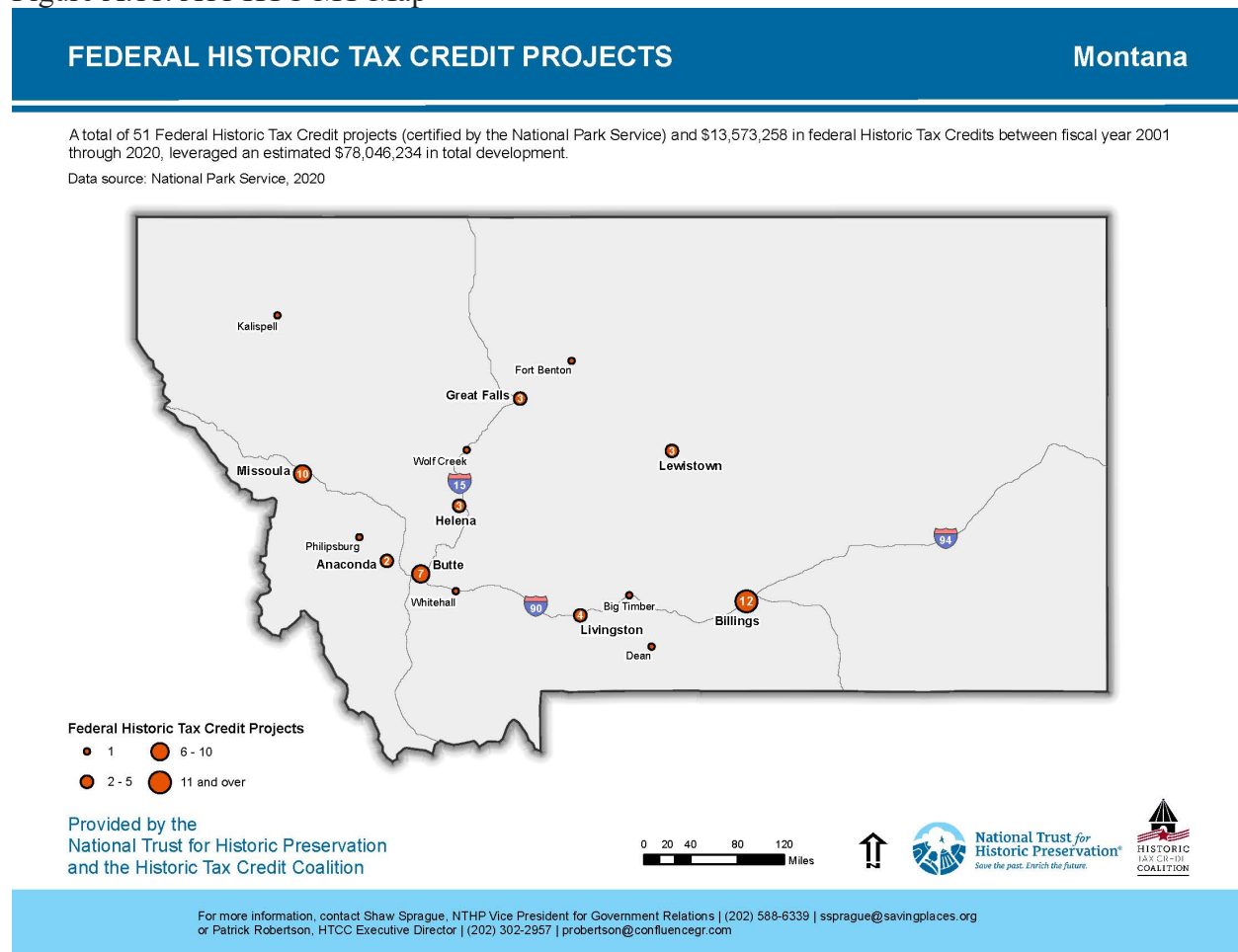


Table A 30. Table MT HTC 20 years

Montana**Historic Tax Credit Projects, FY 2001-2020**

Project Name	Address	City	Year	Qualified Expenditures	Project Use
Marcus Daly and Company Bank Building	123 Main Street	Anaconda	2009	\$1,534,503	Multi-Use
Marcus Daly & Company Bank Building Addition Renovation	108 East Park Avenue	Anaconda	2003	\$140,000	Office
Harrison, Waborn, & Sarah Ranch Hou	HC 88 Box 3712	Big Timber	2002	\$250,871	Housing
Price Motor Sales	2611 Minnesota Avenue	Billings	2016	\$566,000	Commercial
George L. Tracy Building	2528 Montana Avenue	Billings	2013	\$2,343,177	Housing
The Babcock Theatre Building	114-124 N. 28th and 2808-2812 2nd Ave North	Billings	2012	\$2,404,272	Multi-Use
Swift Building	2605 Minnesota Avenue	Billings	2010	\$1,503,600	Office
L & L Building	2624 Minnesota Avenue	Billings	2008	\$647,138	Multi-Use
The Masonic Temple Building	2806 Third Avenue North	Billings	2008	\$1,026,349	Multi-Use
Electric Building	113 & 115 N. Broadway	Billings	2008	\$511,869	Multi-Use
Oliver Building	2702 Montana Avenue	Billings	2007	\$2,140,000	Multi-Use
John Mills Agricultural Implement Store	2606 Montana Avenue	Billings	2007	\$764,127	Multi-Use
Acme Building	109-111 N. Broadway	Billings	2005	\$2,139,018	Multi-Use
Fire House #2	201 South 30th Street	Billings	2004	\$415,582	Multi-Use
Armour Cold Storage Building	One South Broadway	Billings	2002	\$512,500	Housing
No project name	668-670 South Montana Street	Butte	2017	\$315,355	Housing
Dyckman Building	10 & 12 South Idaho Street	Butte	2015	\$814,026	Housing
W.J. and Ester Conroy Bungalow	620 West Silver	Butte	2014	\$138,810	Housing
Bill Boll Bungalow	630 West Silver	Butte	2011	\$210,412	Housing
Historic Sears Building (Hennessy Annex)	32-40 East Granite Street	Butte	2011	\$7,831,200	Multi-Use
Montana Leather Company Building	126-134 S. Main Street / 3-5 E. Mercury	Butte	2003	\$60,000	Commercial
Grand Silver	22 W. Park Street	Butte	2000	\$1,400,000	Multi-Use
4K Ranch Main Lodge	541 Fiddler Creek Road	Dean	2002	\$0	Housing
Pacific Hotel-Culbertson House	1500-1504 Front Street	Fort Benton	2005	\$235,000	Commercial
Arvon Block	114-118 First Avenue South	Great Falls	2015	\$6,619,579	Multi-Use
Baum - Trinastich Building	114 3rd Street S.	Great Falls	2013	\$1,300,000	Office
Minneapolis Steel and Machinery Company Bldg.	225 2nd Street South	Great Falls	2002	\$170,000	Other



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Save the past. Enrich the future.



Project Name	Address	City	Year	Qualified Expenditures	Project Use
Fort Harrison Veterans' Hospital Historic District - Officers' and Commanding Officers' Quarters	Two Miles N.W. of Helena, Montana	Helena	2020	\$4,600,000	Housing
Fort Harrison Veterans' Hospital Historic District-Hospital Building and NCO/Medical Staff Quarters	Two Miles N.W. of Helena, MT	Helena	2020	\$5,000,000	Housing
YWCA Of Helena	501 North Park Avenue	Helena	2016	\$2,351,816	Housing
Clowes House	544 4th Avenue East	Kalispell	2013	\$88,135	Housing
Nurses Home for St. Joseph's Hospital	No Address Has Been Assigned	Lewistown	2012	\$983,088	Housing
Judith Theater	219 West Main Street	Lewistown	2008	\$729,062	Multi-Use
Warr-Lane Building	309 West Main Street	Lewistown	2007	\$233,333	Multi-Use
Montana Block	201 South Main Street	Livingston	2015	\$305,272	Housing
The Wilmont Building	124 South Main Street	Livingston	2009	\$890,000	Multi-Use
Auditorium Building	103-105 South Main Street	Livingston	2003	\$178,508	Not Reported
Pastime Building	101 S. Main	Livingston	2003	\$50,000	Commercial
No project name	150 East Spruce Street	Missoula	2014	\$1,797,821	Commercial
Palace Apartments	149 West Broadway	Missoula	2013	\$2,645,937	Multi-Use
Zip Auto	251 West Main Street	Missoula	2008	\$866,474	Other
Montgomery Ward Building (First National Bank)	201 North Higgins Avenue	Missoula	2007	\$2,700,000	Multi-Use
Missoula Mercantile Warehouse	221 & 229 E. Front Street	Missoula	2005	\$1,934,234	Commercial
Robert M. Knight Law Offices / Historic Zeh Residence	526 E. Front Street	Missoula	2003	\$115,380	Office
Wilma Building	131 South Higgins Avenue	Missoula	2002	\$1,908,300	Not Reported
Bluebird Building	220-224 North Higgins Avenue	Missoula	2002	\$160,000	Not Reported
Lenox Flats / Lenox Hotel	300-306 West Broadway	Missoula	2001	\$1,085,000	Multi-Use
No project name	240-244 South Third Street West	Missoula	2000	\$122,000	Housing
Kaiser House	102 N. Montgomery Street (NE Corner of Montgomery & Broadway)	Philipsburg	2013	\$400,000	Hotel
Modern Hotel aka Borden Block	Corner of Legion Avenue & Main Street	Whitehall	2015	\$2,687,543	Multi-Use
Wolk Creek Hotel	300 Main Street	Wolf Creek	2000	\$41,000	Not Reported

APPENDIX F

CONCLUSIONS AND RECOMMENDATIONS

Architect and Preservationist Disconnect

The Historic Resource Committee of the national AIA grew out of the main body of members into an activist and cause-related knowledge group of architects. The past chairperson wrote a description of the responsibility of the architect vis-a-vis historic resources:

The formal process of becoming an architect ...steeped in the notion that architects design new buildings. ...studios largely focused on new building design. The accreditation process ...places major emphasis on education weighted toward new construction.³⁶³

“Society... has been slow to embrace the concept of longevity of use and adaptation in many parts of life. Americans are an independent lot, born of fighting for our freedom.”...doing pretty much as we please.”..abundance has made this independence relatively easy....easier, if not less expensive, to discard and start anew.” “Americans have the same tendency towards buildings.”

2003 formed Preservation Education Task Group by HRC of AIA and joined by ACSA, NAAB, NCARB, NCPTT, “ All architectural students seeking their first prof degree should have a basic exposure to the most fundamental concepts.”

The group agreed to help prevent architects making the often damaging mistake of repairs that are more harmful than the problem leading to long-term damage, is serious enough to make suggestions for changing all levels of the educational and licensing process.

They intended to integrate preservation values into existing courses...:

1. Recording as found conditions,
- 2..Thoughtful assessment prior to action
3. Respect for the interplay of site and building,
4. Respect for the context of community
5. Respect for inherent qualities and characteristics of the existing building’s design;

³⁶³ Joseph K. Oppermann, FAIA. “Why Is Preservation an Elective Course?” *HRC*, December 14, 2017.

5a. material conservation;

5b. the preference for repair instead of replacement;

6. Compatibility with the critical performance characteristics of the established building. In 2006 course outlines were drafted for adoption by schools, and in 2007 and 2009, student competition was held. Model coursework came out of the second competition with preservation ideals under the auspices of the AIA Best Practices program. Sixty percent of fees comes from existing buildings adding climate-change concerns. With sustainability a major thrust and the past president Carl Elefante stating that

we cannot build our way to the Zero Net Carbon emission goals, based on the Paris Accord, instead we have to conserve our way.” “The reuse of an existing building is sustainable design by definition!” The stock of existing buildings is enormous...responsible stewardship must be the guiding principles of this effort.³⁶⁴

Research intersections through the HRC Knowledge Community revealed a trove of opinions about the disconnect between architects and the schools of architecture and preservation called the “heart of the profession” by Dean Bernard Spring, formerly of CCNY the Boston Architecture Center. The recent flurry of email and posting to the HRC message board responded to Skylar Leavitt, a graduate thesis researcher at the University of Oregon, and described in Chapter Six.

Oppermann reported that in 2007-2009 there were some incentives for schools and students of architecture to be more involved in preservation education. This occurred at a depth of the Great Recession after the mortgage industry tanked due to excesses in subprime lending. Those

³⁶⁴ Oppermann, Joseph K. FAIA, “Why Is Preservation an Elective Course?,” *Historic Resources Committee*, December 14, 2017, www.aia.org.

national and international foundations give out the incentives given to architects and preservationists alike for encouraging new research. The study area states were somewhat active in garnering a share of the awards from the Association for Preservation Technology (APT) in Table 31 below:

Table A.31. APT Awards to Scholarships at Colleges

<u>ASSOCIATION FOR PRESERVATION TECHNOLOGY</u>						
<u>SCHOLARS AWARDEES</u>						
RANKING		SECTOR	NO. OF SCHOOLS		Awardees	
1		NE	11		48	
2		SE	9		38	
3		S	6		38	
4		MW	8		36	
5		W	6		15	
SUBTOTAL			40		175	
<u>Breakdown by the Western States</u>						
	<u>STATE</u>	<u>DISTRICT</u>				
		<u>RM</u>	<u>3</u>		<u>6</u>	
	CO		2		2	
	UT		1		3	
		<u>NW</u>	<u>2</u>		<u>5</u>	
	WA		1			
	OR		1		4	
		<u>W</u>	<u>1</u>		<u>2</u>	
<u>GLOBAL AWARDEES SUMMARY</u>						
<u>FOREIGN</u>			<u>21</u>		<u>36</u>	
<u>WESTERN Hemisphere</u>						
USA			40		175	
MEX. & CAN.			3		9	
<u>Rest of World</u>			18		27	

Those architects who volunteered for the inaugural year of Learning Places study online for free and received a certificate for completion. The incentive is not as great as their generosity of time for the sake of the chosen cultural resource in their community. Some of the work follows:

Examples of Final Reports

Table A.32

Project Name	Inputs	Outputs	Outcome Knowledge =K	Outcome Attitude =A	Outcome Behavior= B
Saltpetre Cave, KY	Online Course Cohort 5	NR listing	Using online course for Google Site	Learned then-leader for cohort	Leading a group of cavers rehab
Knoxville Botanical Gardens, TN	Online Course Cohort 5	RFP response	Using Meinig 10 ways for the cultural landscape	Refresher course for RFP	Competing in RFP for the cultural landscape

1. Each of the final report exemplars has an impact potential that cuts across all three of the problem areas neoliberalism, authority vs. agency, and aware civil society. Each provided insight to answer the three research questions. The particulars of each are very informative and can be used by other service learners who follow. Here is one exchange between myself as instructor and moderator of the message board and the service-learner named (NJ).

Instructor:

I wonder if the client has ever measured the amount of ground movement causing the deterioration. Would a crack-monitor installation help gauge if this movement is still going on, whether it is seasonal, and to what extent it will damage any mitigation you propose going forward?

Oct 31, 2019Oct 31, 2019 at 5:54pm

Service Learner NJ (Ohio-based) wrote: "I am choosing it as a volunteer."

"The "client" is an all-volunteer nonprofit organization: The Great Saltpetre Cave Preserve Management Committee of the Rockcastle Karst Conservancy. R.K.C. was founded in 2004 and accepted ownership of the property in 2006, long after the settlement took place. A crack monitor will not reveal any new information at this point. My oldest convenient (digital) photograph of the Ticket House is from 2006, and there has been no movement since then".

"The movement is not seasonal. I figure that when dirt was moved around from the entrance of Great Saltpetre Cave in 1966, it was pushed over this way and not

properly compacted as a building pad. I wonder if there was an intent to build something here before the earthmoving was done, or if it just looked like a good building pad and the owner (deceased in 1985) directed the construction of this building. Nonetheless, if no additional load is applied, there should be no more movement since none has been observed in the last 13 years.”

“I have plenty of documentation to share.”

The Ticket House was constructed in 1968 and is within the site boundary that is listed. The south wall of the Ticket House settled as the ground moved, causing the stone wall to disintegrate fairly early in the building's life. It was patched with a stud wall and sheathing, which has now rotted away. The Management Committee is ready to repair/restore the foundation and the south wall to original weathertightness and incorporate some memorial plaques. This project will also repair the concrete floor inside and prepare the building to become a museum for artifacts of the cave and purchase a few souvenirs. Some people who visited the cave as youth remember display cases inside and the ability to purchase souvenirs as well as tickets. The two toilet rooms in the back have been out of service for many years, and there are no water or sanitary lines to it; therefore, those spaces will be repurposed for storage.

Figure A.12

Instructor:

Nov 1, 2019 at 7am

“That is a very good background, and you already have an NR-listed property. If you move along to week two reading, you will be encouraged to set up a project Google Site or other online presence for your documentation. You would upload some of your photos, scans of docs, NR nomination copy. It will serve as your communication palette for the stakeholders to visit and add their comments or additional data.”

Website created by the service learner. Link to it by holding down Ctrl + clicking on the photo:



Figure A.13

The following was the submission of the project proposed for the service learner who is an architect licensed in Ohio and Kentucky, where the cave is located. Cultural Resource: The Ticket House at Great Saltpetre Cave Preserve (GSP) is listed in the N.R.H.P. #13000565.

Service learner NJ wrote:

“Now that the Ticket House has passed five decades of existence, I submit that it qualifies to be listed as a contributing building as part of the Great Saltpetre Cave District, but only for the Tourist Cave period of significance. It sits no more than fifty feet away from the South entrance, and I have heard stories of coming to the Ticket House window to buy a ticket for a tour, and other stories of souvenirs for sale inside the Ticket House.”

December 2019 Project Completed and Certificate was issued.

The following is the typical response I use in response to the proposal by the service learners. In addition, the discussion posts are another means for sharing ideas with the cohort.

Instructor: placed the following on the message board for a student:

Sounds very interesting and site has multiple issues. Are you choosing this as a volunteer or is it a commissioned project for your professional practice? Either way there is a lot to share with your cohort. You will see in the documentation week discussion the request to share what resources you have on hand from the client of vintage reports and photographs. When you get to week four for assessments, you will be reading the property systemically for its condition and integrity before deciding on a proposed treatment.

Figure A.14

The Second Final Report Project modeled after my conceptualization for the Remembrance Grove involves a historic botanical garden still not placed on the National Register as a new district. An online student enrolled in the Learning Places researched how this project could be moved forward and provided the narratives and background research for the following mock-up of a preliminary final report with my taking it to the next level of a PowerPoint for inclusion in the Appendix.

Its most vital point is preparing a nonlisted property by doing the core technics learned in the online course for a nomination to the NR. In so doing, it uses the strengths of the agency to convince the authorities that this botanical garden is indeed a historic cultural landscape and for the community to rally around the new historic district and begin to rehabilitate its historic properties using all the tools from Learning Places, including another HTC project and applications for grants in aid.

In organizing the nomination effort, the service learner can assume a short-term leadership role to help save this cultural resource without commercializing a special public space

with a noted genius locus that evolved slowly. The place was in the hands of the legacy family who began a gardening center business over a century ago.

“I wanted to let you know that I have a tentative project – National Register nomination of the [Knoxville Botanical Gardens](#). The property is unique more for its cultural history than the actual architecture, along with its impact on local business and potentially the Great Smoky Mountains National Park and T.V.A. The TN Historical Commission had said it was worthy for nomination in 2003, but the group could not afford it. I have shared updated photos with them, and I am awaiting word. Additionally, I have to make a presentation to the Executive Bd on March 17 before I can proceed. In essence, to convince one board member that it will not restrict what they can do to the property but will provide potential access to funding and federal protection. Our city’s historic district overlay is fairly weak. So, if that is approved, I can begin.”—service learner NJ.

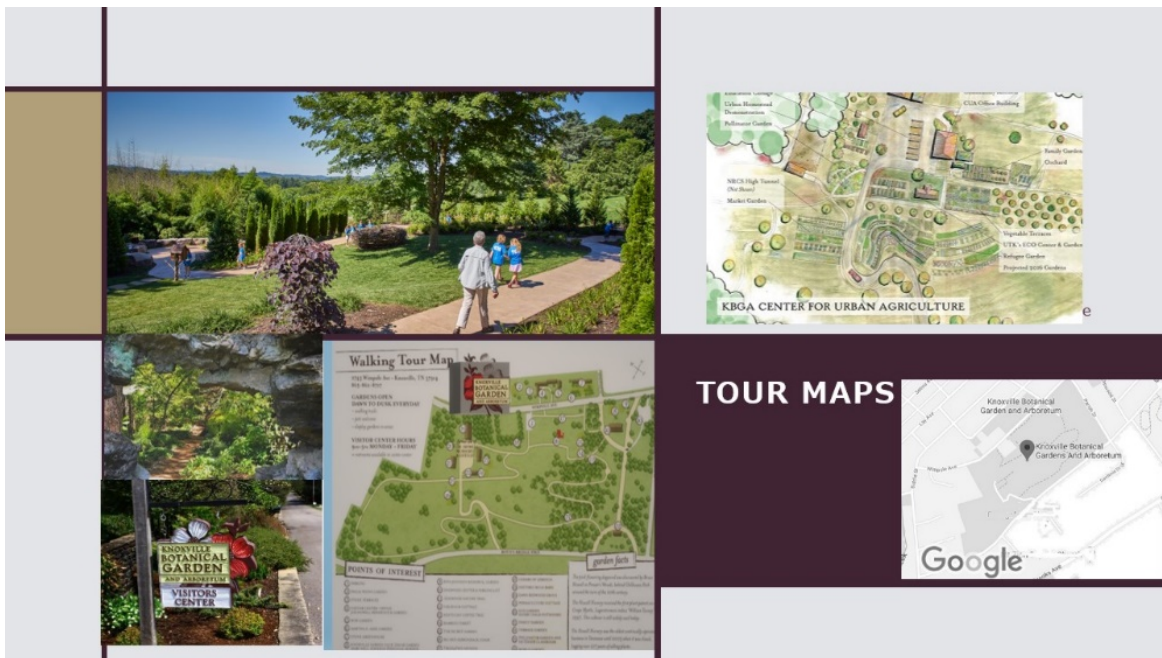


Figure A.15. Knoxville Botanical Garden Historic District

3. Remembrance Grove at Montana State University:

Ending with the third project, Remembrance Grove, allows me to illustrate through this example that incorporates more of the benefits offered by each of the recommendations from Chapter Six. The project I conceptualized as a model for the online service learners to follow for

their final reports. The director of the veterans' programs at the university warmly received this proposal at Montana State. His program has had a two-year oral history project underway for WW II veterans and families.

The benefits of each of the preceding exemplars are unique to the special places. Included in this project is preserving the former housing from the post-WW II era at the university. In addition, the opportunity for education of the public exists in this project.

Anyone interested can learn about historic sites and their preservation, the potential for using Historic Tax Credit Programs may appeal to donors, and all of this stems from the findings to the three research questions.

Pairing the adaptive use of the former housing, known as the Monopoly Houses, reminds people of the board game place markers, with the development of a museum-quality exhibition is the paramount goal. Those narratives of returning veterans and their families' recollections add another level of public history for an aware civil society. As for the problem of neoliberalism dynamics in the real estate market, the Grove mitigates the spiraling costs of the local area residential market as it keeps the open space for public use. It can also tell of another time when housing was scarce, resulting in the constant rising inflation and housing costs since the war.

The site lies within the Opportunity Zone (O.Z.) for investors that can help with disadvantaged census tract resilience. This area was identified and certified by then-Governor Bullock of Montana and the Treasury Department for startup business and reinvestment under this congressionally authorized O.Z. program.

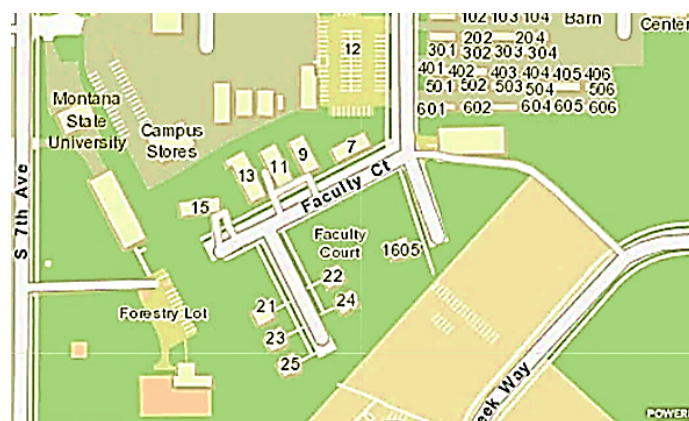
Lastly, planning a long swath of an underutilized buffer zone can build the agency of those stakeholders who, by consensus, draw upon counter-mapping efforts. The stakeholders

would be more inclusive: the neighborhood, a grassroots history advocacy group, and the State University departments, including the Rockies Museum. Thus an empowering cooperative can emerge that satisfies several ends as it becomes a multi-year effort that Learning Places online community of learners can contribute to and learn from going forward.



Figure A.16. Existing Site plan with Building Numbers at Faculty Court

The following are screenshots from the PowerPoint presentation for an interested stakeholder.



REMEMBRANCE



GROVE

WORLD WAR II COURT
EXHIBIT BUILDINGS

and

COMMEMORATIVE LANDSCAPED
VILLAGE

Research Space at Expanded
Campus Archives
at
Montana State University



• The Post War Boom at MSU:

To meet the immediate needs of G.I. student and faculty housing and expanded classrooms, then President Roland Renne quickly installed recycled wooden buildings as classrooms. To accommodate student and new faculty housing, Renne found **prefab war-surplus wooden frame building**, quonset huts, barracks, and over 100 small trailers.

GI Bill summary stats

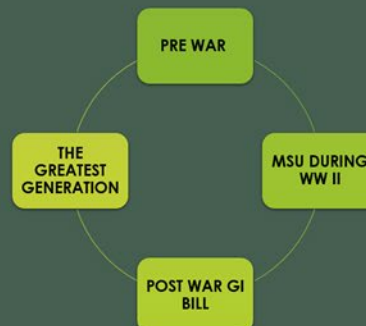
- 1700 veterans of 3100 students at MSC; subsistence grew from \$50 - \$105/month
- 51% of all 7.8 m veterans were recipients of GI Bill educational and training program.

GI Bill cost 14.58 dollars and increased the earning power of the veterans appreciably.

- Median income of veterans during a 6 year period (1953-59) is up 51% compared with a 19% rise for nonveteran males in the same group.
- Veterans had more than 4 yrs of high school while nonveterans had but 2 yrs for same age group.
- WW II max enrolled was 2000 in 1946-47 and ended in 1956-57. At its peak it was .66 of student pop.



THE WW II THEMES





The Opportunity Zone legislation enabled each governor to single out eligible census tracts. These site plans illustrate a design concept in response.

The OZ is a challenge to the People who can build the institutions that will democratize the processes by which the future cities will be built, whether we mean "build" in material terms or in terms of communities' social shaping? Substantive change can be innovated with some imagination that goes beyond the status quo altogether too limiting for creatin the future cities. from Future Cities

Community Next Steps

Communities designated as Opportunity Zones should consider taking steps that best position for investment, development, and growth within the census tract.

PROACTIVE

Update and develop community-wide planning documents, site-specific planning, or an Opportunity Zone prospectus that strategize land use, redevelopment, and rehabilitation opportunities and identify resources available for correlating infrastructure or architectural planning needs. Educate and engage local partners in conjunction with ongoing development of Opportunity Zone regulations and state and national examples.

Departemet of Commecie State of Montana

