

Professional Development for Conservators in the United States

Report of the Directors' Retreat for the Advancement of Conservation Education

The Getty Conservation Institute
in Partnership with
The American Institute for Conservation

Airlie Center
Warrenton, Virginia
October 10–12, 2002

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The Getty Conservation Institute



The American Institute for Conservation
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Proceedings are based on transcripts made by
Sherwood and Eunice Shankland of Shankland & Associates,
with summaries and editing by the retreat participants.

Preface

In 2002 the Getty Conservation Institute (GCI) launched a new initiative, called Directors' Retreats, to provide an opportunity for leaders in conservation education to discuss and reflect on issues that will help advance the field of conservation. The first retreat was held October 10–12, 2002, at Airlie Center in northern Virginia.

The American Institute for Conservation of Historic and Artistic Works (AIC) was the first partner for this Directors' Retreat. The opportunity came at a critical time for AIC, as it was just expanding its program for professional development as a result of a generous \$1.5 million endowment gift from The Andrew W. Mellon Foundation. The Directors' Retreat provided an opportunity for AIC to meet with leaders in conservation education in the United States and begin to chart the direction of AIC's program of professional development.

In 2001 AIC conducted a membership survey on the continuing education needs of its more than 3,000 members and created a Strategic Plan for Professional Development for 2001 to 2005. The results of the survey included more than 1,100 suggestions for course topics that were inspired by individual needs for professional advancement, interest in a specific topic and popular courses that were not easily accessible. Sorting through the topic suggestions and trying to identify priorities based on the number of responses in each category have helped AIC determine what individuals wanted, but did not directly address the future trends or the profession's overall needs.

AIC's aim was to better identify how its professional development program could advance the profession. Combining conservators' needs (identified in the 2001 AIC membership survey on continuing education) with possible future directions for the profession as a whole (identified in this Directors' Retreat) enables AIC to better select priorities and determine how to achieve them.

Acknowledgments

To Jerry Podany, President of AIC, we owe thanks for his leadership in conceiving the retreat and for helping to steer AIC into the future. Penny Jones, AIC Executive Director, and Eric Pourchot, Program Officer for Professional Development, were both instrumental in planning the content of the retreat and continuing to use the information gained in managing the fundraising and operational aspects of AIC's professional development program.

Eunice and Sherwood Shankland of Shankland & Associates were the facilitators for the retreat. They deserve many thanks for keeping the proceedings on track and productive. The Airlie Conference Center in Warrenton, Virginia, provided a relaxed and idyllic setting conducive to reflection and creativity. I would also like to thank Elizabeth Jackson, Senior Project Coordinator at GCI, for arranging all the travel and financial logistics.

To all the retreat participants who collectively have 324 years of experience in conservation, Martin Burke, Neil Cockerline, Kathleen Dardes, Michele Marincola, Debbie Hess Norris, Karen Pavelka, Jerry Podany, Eric Pourchot, Krysia Spirydowicz, Mary Striegel, Chris Tahk, Bert Van Zelst, Martin Weaver and Laura Word, I extend my gratitude for their time away from their busy schedules, their generous advice, their enthusiastic discussions and their most helpful insights and ideas.

Finally, I would like to thank Tim Whalen, Jeanne Marie Teutonico and Kathleen Dardes of the Getty Conservation Institute for their support of the advancement of conservation education. Their foresight provided the opportunity for this retreat.

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Background of AIC's Professional Development Program

A long-standing AIC goal is to better define and effectively advance the profession of conservation. As with most professions, continuing education plays a vital role in keeping its practitioners up to date with the latest research and developments in their fields. In 1991 the AIC created the board position of Director, Professional Education and Training. The responsibilities of this position included assessing the education needs of the membership and providing opportunities to meet those needs. Over the years, AIC began to offer a few half-day workshops and an occasional one-day workshop at its annual meetings, increasing the number of workshops over the years to seven at the 2002 annual meeting. Members who could not attend annual meetings, or who could not take advantage of an offering because it was fully booked, repeatedly identified a need to expand the offerings around the country so they and others could participate in more workshops.

In 2001 the AIC launched a newly expanded program of professional development for conservators throughout the United States. The expansion was made possible by an endowment gift of \$1.5 million from The Andrew W. Mellon Foundation to the Foundation of the American Institute for Conservation (FAIC), a financial support organization for AIC. The funds initiated the new FAIC Endowment for Professional Development. Interest earned on the endowment supports programming costs for professional development activities such as short courses and workshops. An additional \$300,000 provided support for a Program Officer for Professional Development for the first five years of the program.

A parallel effort to continuing education is the development of a certification program for conservators in the United States. Questions include what influence certification will have on the direction, content and priorities of a professional development program. Building a strong program for professional development aids the growth of the profession *regardless* of the existence of a certification program. It is not AIC's intent to build a professional development program that would qualify people to become conservators. Rather, the program is geared toward mid-career-level continuing education. The more significant relationship between professional development and certification lies with re-certification, wherein individuals may find opportunities to continue their education so they may apply those experiences toward ongoing re-certification.

The three-day agenda of the retreat (see Appendix I) allowed AIC to explore the many creative ideas and practical suggestions offered by the participants. Although the proceedings were not intended to be comprehensive or prescriptive in nature, a great deal of ground was covered and numerous specific initiatives were generated as a result of working-group activities and structured discussions led by the facilitators. These exercises and discussions were designed to elicit creative and spontaneous thinking by retreat participants.

Through the exercises, the group explored current trends in the field, described qualities that may be needed by conservators in about ten years' time, suggested education and training needs of conservators based on those trends and forecasts, recommended selected topics and curriculum development methods, and provided several resource ideas for implementing AIC's professional development program.

The ideas that resulted from the discussions and exercises during the retreat are presented in the following section, called "Outcomes." A summary of the proceedings describing the various exercises can be found in Appendix II.

The ideas expressed in this report should be seen as a collage of thoughts rather than an outcome of a deliberative or juried process. Without being “conclusive,” the outcomes of the retreat, when taken in context with the 2001 Membership Survey on Continuing Education and the Strategic Plan for Professional Development 2001–2005, help give a strong direction for AIC programming of professional development.

Outcomes

1) General Outcomes

- a) The retreat established AIC's education program as a model of formalized mid-career professional development in conservation throughout the world.
- b) The retreat strengthened cooperation among academic degree programs providing conservation education in the United States and between those programs and AIC.
- c) Information from the retreat, as noted by many participants, will aid in their own institution's endeavors.
- d) The retreat identified potential partnerships and collaborations, offering expertise, course materials, instructors and facilities.

2) AIC's Professional Development Program Goals

- a) The program will address a lack of continuing education activities in conservation by increasing the availability of professional development opportunities to conservators in the United States.
- b) The program will focus on mid-career continuing education needs for conservators.
- c) Professional development activities will enhance the knowledge, skills and abilities required by conservation professionals today and in the future.
- d) Leading experts in the field will be called on to offer high-quality education opportunities.
- e) The program will remain responsive to membership needs.
 - i) The program will be guided by membership surveys while remaining committed to advancing the profession through foresight and leadership.
 - ii) AIC's Professional Development Program will remain flexible to accommodate new initiatives that fit within the overall mission and goals of the professional development program.
- e) AIC will continue to assess both individual needs and the greater overarching trends and emerging needs of the profession to enable growth in areas such as outreach and public relations, better communications and management skills for its constituents, and increased multidisciplinary approaches.

3) Trends in the Profession

- a) The profession of conservation is growing and changing. Emerging trends include:
 - i) The advancement of new technologies.
 - ii) The need to enhance communications skills, the ability to compromise and collaborate.
 - iii) The need to market conservation to allied professions and the public.
 - iv) Increasing demand for specialization while retaining a critical level of general skills and practices.
 - v) Increased expectations for entry-level and mid-career-level conservators.

- vi) Development of a U.S.-based certification program.
- vii) More than half of AIC members today are conservators in private practice.

4) Conservators' Needs

- a) Conservators' needs are continually identified by ongoing evaluations, surveys and communications among AIC members and specialty groups.
- b) Conservators with and without formal degrees benefit tremendously from refresher courses as well as new research, new technologies and new materials. They may wish to merely brush up on some of their skills, like inpainting or tape removal, or to have devoted time to interact with colleagues to explore and condense a vast array of information on a particular subject through a more in-depth course.
- c) Conservators will continue to need an ever-broadening array of knowledge, skills and abilities to keep pace with the expanding challenges of the field.
- d) Current education and training needs of mid-career conservators include categories of treatment, science and technology, preventive conservation, documentation, fundamentals and problem-solving skills, institution and business practices, communications skills and client relationships.
- f) Conservators need increasing professional development in areas of management, leadership, communications, interdisciplinary approaches and business practices.

5) Program Content

- a) The most commonly identified course topics were:
Computer tools for documentation and digital imagery; health and safety; emergency preparedness and response; adhesives; working with cultural heritage in contexts; business, marketing and management; analytical methods; designing conservation facilities; treatment materials and methods; preventive conservation; new materials; research and resources; pest control; past treatments; presentation skills; grant writing.

6) Expanding the Program

- a) AIC will work with partners to expand its professional development offerings.
- b) AIC will contract out for expertise in areas such as adult education methodologies, curriculum development and instructor training.
- c) AIC will continue to fundraise to increase the current Endowment for Professional Development from \$1.5 million to more than \$3 million in order to secure the program's long-term sustainability.
- d) AIC will continue to fundraise for project support to provide new short-course topics, increase scholarships, assist with instructor training and expand course offerings around the country and on-line.
- e) Numerous resources were suggested to help with developing and refining new courses; potential partnerships, instructors, facilities and locations for courses; how to market courses; and possible resources for fundraising.

Conclusion

The Directors' Retreat provided the much needed opportunity for AIC to meet with education leaders in the field and to pause and reflect on how a newly expanding program for professional development in the United States can be steered toward advancing the profession.

Key to the success of AIC's Strategic Plan for Professional Development will be the timely application of the information shared in this retreat. AIC continues to expand its offerings by increasing the number and variety of workshops offered nationally. With the knowledge gained in the Directors' Retreat, AIC is beginning to develop new courses. Results of the retreat will directly aid in helping to know which topics to develop and offer over the next few years. Resources such as potential partnerships and funding sources identified during the retreat will assist in achieving these goals.

An essential next step is for AIC to secure sustainability for its professional development program to enable ongoing administration, new curriculum development, instructor development, scholarships and the technological infrastructure for on-line course announcements, registration, dissemination of course materials and Web-based classroom support. In addition to pursuing partnerships, AIC is proceeding immediately with fundraising to increase the FAIC Endowment for Professional Development and to secure additional onetime project support grants toward these endeavors.

The impact of this retreat extends far beyond AIC and GCI. The retreat provided an opportunity for increased communication and collaboration among institutions and organizations engaged in conservation education. Several participants noted how the information shared would aid them with their own institution's education endeavors. The knowledge gained during the retreat guides and expands AIC's program for professional development so that it may also serve as an education model for the field of conservation in other areas of the world. It is with collaborations such as this Directors' Retreat that the profession will find new opportunities to advance the field of conservation through education.

Appendix I: Retreat Agenda

Conservation Education Directors' Retreat
October 10–12, 2002
Airlie Center, Warrenton, Virginia

Retreat Focus:

To establish professional development priorities for AIC based on long- and short-term needs of mid-career conservators.

Wednesday, 9 October

3:00 pm Earliest check-in time at Main House for early arrivals

7:00 pm Buffet dinner, Main House Garden Room
Carpool, walk, bike or van shuttle

Pub on premises is open 5:30–11:00 pm every evening for snacks and drinks at participants' own expense.

Thursday, 10 October

Early Risers Walks, bike rides (optional)

7:00 am Optional full breakfast buffet at Main House Dining Room
Morning refreshments such as pastries, fruit, juices, tea and coffee will also be available at the start of and during the meeting.

10:00 am Retreat Opening and Introductions

10:30 am Participants' Updates: Missions and Priorities
Each participant has 5 minutes to update the group on new developments pertaining to conservation education within his or her own institution.

12:00 pm Lunch break

1:30 pm Current Trends in Conservation and Professional Development
A discussion of factors that affect the profession and what they mean to the professional development of conservators, with special emphasis on mid-career conservators.

3:15 pm Coffee break

3:30 pm A Portrait: The Conservator of 2012
An exercise to define the future needs of conservators.

5:00 pm Free time

6:30 pm History of Airlie Center and Its Architecture *(optional)*
Meet at Main House.

7:00 pm Plated dinner at Main House Garden Room

Friday, 11 October

Early Risers *Walks, bike rides (optional)*

7:00 am Optional full breakfast buffet at Main House Dining Room
Morning refreshments will also be available at the start of and during the sessions.

8:30 am Identifying the Needs for Mid-Career Training
A broad-based brainstorming session.

10:15 am Break

10:30 am Identifying Mid-Career Content Needs
Working groups to further identify mid-career education content needs.

12:00 pm Lunch break

1:30 pm Plenary: Reports and Discussions

3:00 pm Coffee break

3:15 pm Prioritizing Mid-Career Content Needs

5:00 pm Free time

7:00 pm Dinner cookout at the Loft

Saturday, 12 October

<i>Early Risers</i>	<i>Walks, bike rides (optional)</i>
7:00 am	Optional full breakfast buffet at Main House Dining Room <i>Morning refreshments will also be available at the start of and during the sessions.</i>
8:30 am	How Do We Get There? <i>A discussion to identify professional development program implementation needs.</i>
10:15 am	Break
10:30 am	Implementation Strategies <i>Working groups to discuss strategies for specific needs.</i>
12:00 pm	Lunch break
1:30 pm	Plenary: Reports and Discussions
3:00 pm	Coffee break
3:15 pm	Resources <i>A discussion to identify tangible and potential resources.</i>
4:00 pm	Retreat Reflections and Evaluation
5:00 pm	Close
7:00 pm	Buffet dinner at Main House Garden Room

Sunday, 13 October

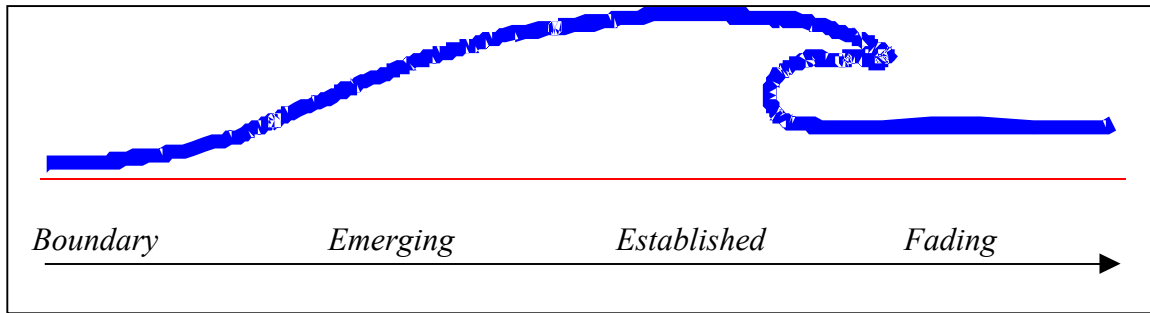
7:00 am	Optional full breakfast buffet at Main House Dining Room
11:00 am	Latest check-out time <i>Box lunches available for pick-up at Main House on check-out.</i>

Appendix II: Proceedings Summary

The contents of the proceedings primarily reflect the immediate responses of the participants to questions about conservation in the United States. Many of the exercises were deliberately truncated to encourage creative and spontaneous thinking, and responses were not edited or subject to approval by the group.

Current Trends in the Conservation Profession

“The Wave.” In this exercise participants wrote trends on a piece of paper. The group then posted the trends by organizing them into columns representing “boundary,” “emerging,” “established” or “fading” trends.



Boundary trends that are in the distant future included certification, interdisciplinarity, conservation as a social function, marketing conservation, and sustainability of projects and the profession.

Emerging trends, identified as those just beginning to form, included the use of appropriate technology and technology transfer, diversity within and beyond the profession, distance learning, devaluation of the profession, new approaches to conservation management, and electronic media and its associated challenges.

Established trends included formal education as the norm for entering the profession, the importance of cultural heritage use and accessibility, ethical guidelines, documentation, the need for more outreach and advocacy, preventive measures, health and safety, collaborations, the undervalued status of the profession, and recognition of the need for increased continuing education opportunities.

Fading trends identified were documentation by silver-based images and reliance on print materials, lack of collaboration among specialties, focus on fine art at the expense of other forms of cultural heritage, generalist training, outdated treatment methods and the predominance of a single “master restorer.”

Several commonalities and overlaps were noted in reviewing implications from the trends exercise. Of note were:

- Advanced use of new technology such as electronic imaging.
- Development of communications skills (from lecturing to managing and selling).
- Need for more marketing of conservation to allied professions and the public.
- Increased focus on specialty areas, in addition to the need for generalists.
- Collaboration is now a norm. Compromise and integration are necessary today.
- Need to identify the expectations of entry-level and mid-career conservators.
- Conservators in private practice, who make assessments, use preventive skills and perform hands-on treatments make up over 50% of AIC's membership.

Portraits of a Conservator in 2012

Given a very limited time, three groups each drew a composite portrait of what conservators might “look like” ten years from now, and what key knowledge, skills and abilities will be required.



Common knowledge skills and abilities identified among the participants included knowledge of terminology, ethics, history of conservation, cultural context, cultural history and cultural sensitivity, familiarity with allied professions, aesthetics, history, history of technology, preventive conservation, material science, health and safety, science and technology, analytical technologies, treatment materials and methods and information technology. Skills included hand-to-eye coordination and manual dexterity, research, problem solving, communications, management, marketing, outreach, computer skills, photography, digital imaging, grant writing and fundraising. Abilities included patience, attention to detail, compromise, balancing many things, seeing the bigger picture and weighing consequences.

Education and Training Needs of Mid-Career Conservators

After an initial brainstorming session, participants wrote down general topics and organized them into a chart. They then went back in small groups to review the preliminary brainstorm chart, and further organized and added topics to round out each category. (Chart is continued on next page.)

1. Treatment	2. Science and Technology	3. Preventive Conservation	4. Documentation
<p>Materials Material science of adhesive Material science of modern pigments Material science of plastics and composite materials Material science of modern media, video, digital, etc. Traditional and non-traditional building materials (material science)</p> <p>Applications Use of adhesives: Why? How? Inpainting skills New treatment techniques Treating and caring for new classes of collection materials Sculpting, molding, casting</p> <p>Evaluation Post-treatment evaluation (short and long term) Re-evaluating treatment methods and materials Loss compensation: comparative approaches</p>	<p>Material Sciences Mechanical & Chemical Properties/ Deterioration Adhesives Solvents Coating Sciences History of Technology Specific Materials: Paper, Wood, Stone, etc. Updates in Analysis and Examination Low-/high-tech analytical methods Diagnostic technologies – virtual reality Non-destructive characterization techniques Microscopy techniques and applications New Materials in Collections (Science and Care) Emerging tech materials Plastics/ synthetics Electronic media Composite materials Magnetic media</p>	<p>Preventive conservation management Investigation/ assessment/ surveys Risk assessment and management Emergency preparedness response recovery Security Building-related issues Master plans (CMP) Environmental control – light, RH, temp., pollutants Integrated pest management Packing/ shipping Biodeterioration (new approaches) Exhibits Storage Building blocks environment Planning</p>	<p>Computer applications for conservation (tools, documentation) Documentation imaging methodologies Knowledge of standards Mastering digital imaging GIS (geographical information systems) Computer application software training</p>

Education and Training Needs of Mid-Career Conservators

(Continued from previous page)

5. Fundamentals (Problem-solving Skills)	6. Institution or Business Practices	7. Communications Skills	8. Client Relationships
<p>Critical thinking: problem solving</p> <p>Information literacy</p> <p>Connoisseurship</p> <p>Aesthetics</p> <p>Interdisciplinarity</p> <p>Scientific method</p> <p>Research design skills</p> <p>Health and Safety Personal Protection</p> <p>Handling toxic substances and objects</p> <p>Ergonomics, personal injury prevention</p> <p>Health and safety in disasters</p> <p>Biohazards</p> <p>New technologies for personal protection</p> <p>Health and Safety Legal Issues, OSHA, EPA codes</p>	<p>Project planning and management</p> <p>Fiscal management and budgets</p> <p>Grant writing</p> <p>Legal issues: intellectual property issues</p> <p>Personnel management, supervision, evaluation</p> <p>Lab design</p> <p>Small business management</p> <p>Pricing and bidding services</p> <p>Insurance</p> <p>Contracts and valuation of services</p> <p>Business marketing strategies</p> <p>Transport</p>	<p>Management Skills</p> <p>Managing up and down</p> <p>Negotiating skills</p> <p>Arbitration, team building, conflict resolution</p> <p>Interpersonal skills</p> <p>Publishing</p> <p>Preparing professional publications</p> <p>Preparing popular publications (schools/ public audiences)</p> <p>Communicating with Professionals</p> <p>With allied professionals</p> <p>With conservation community</p> <p>Presentation skills</p> <p>Advocacy</p> <p>Mechanics of marketing conservation</p> <p>Interviewing for optimal media attention</p> <p>Public speaking (content/ mechanics)</p>	<p>Legal Issues</p> <p>Collections related</p> <p>NAGPRA</p> <p>Conservation Practice Related</p> <p>Stakeholder Values</p> <p>Cultural issues of examination and treatment</p> <p>Public heritage</p> <p>Identify stakeholder</p> <p>Community values</p>

Course Catalogues for 2003: Curriculum Topic Prioritizations

In this exercise participants in small groups were asked to write sample course catalogues comprising of five of the most important courses related to a conservator's mid-career educational needs. Each of the five courses were to be selected from a different curriculum category (columns numbered 1-8 from the chart above.) Participants agreed on the following criteria for course selection for this exercise: that the courses were useful to several material specialties, that they were in popular demand, that the topics were necessary and that they would have the highest impact on the profession as a whole.

A tabulation of topics that were included in the course catalogues hint at perceived priorities.

General Course Topic	Number of times included in catalogue exercise
Documentation, digital imaging, using computers	4
Health and safety	4
Emergency preparedness, response, recovery	3
Adhesives	3
Cultural context issues	3
Lab or new building design	2
Plastics	2
Business practices, marketing	2
Analytical methods	2
Grant writing	1
Presentation skills	1
Preventive conservation, collections management	1
New materials	1
Materials properties	1
Research skills, resources	1
Pest control	1
Past treatments	1
Planning, management	1

A tabulation of the curriculum categories drawn from the course catalogues indicates priorities within each category.

Curriculum Category Title	Number selected in each category
Preventive Conservation	7
New Technology and Science	6
Treatment	6
Business Practices	5
Health and Safety	4
Documentation	4
Community Values	3
Communications Skills	2
Problem-solving Skills	1

Curriculum Development Models: Three Possible Scenarios

Working in three groups, participants were asked to choose a workshop topic (pretending that no course currently existed for that topic) and to create a model for developing a curriculum for that topic. Each group had the same task but different budgets. The goal was not to develop the course itself, but to suggest a structure and budget for the development.

Outcomes of this exercise indicated that costs for new curriculum development can easily be in the \$50,000 to \$100,000 range; that AIC will need to fundraise for new course development; that AIC will benefit from partnering with other institutions and organizations both for financial support and for external expertise. It also became evident that there is no one way of developing new courses. Volunteers, advisory committees, consultants and experts from related fields were all suggested in the new course development models. Participants suggested picking one or two topics at a time and striving for quality rather than quantity.

The Resource Carousel: A Brainstorm List

During this exercise, participants rotated around the room to post suggested resources for AIC's professional development program. Many of the names and resources that were listed were not contacted for their permission to use or disseminate in this report. The resource list resides with the Program Officer for Professional Development in the AIC office.

Appendix III: Participant List

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