

# ForumJournal

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NATIONAL TRUST FOR  
HISTORIC PRESERVATION

## AMERICA'S HISTORIC SITES AT A CROSSROADS



The National Trust for Historic Preservation is a nonprofit membership organization bringing people together to protect, enhance and enjoy the places that matter to them. By saving the places where great moments from history — and the important moments of everyday life — took place, the National Trust for Historic Preservation helps revitalize neighborhoods and communities, spark economic development and promote environmental sustainability. With headquarters in Washington, DC, 9 regional and field offices, 29 historic sites, and partner organizations in all 50 states, the National Trust for Historic Preservation provides leadership, education, advocacy and resources to a national network of people, organizations and local communities committed to saving places, connecting us to our history and collectively shaping the future of America's stories. For more information visit [www.PreservationNation.org](http://www.PreservationNation.org).

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# ForumJournal

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Photo opposite: At Drayton Hall, thousands of schoolchildren engage with the past in many ways, including hands-on activities such as the winnowing of rice. Photo courtesy of Drayton Hall.

The Forum on Historic Sites Stewardship in the 21st Century was held at the Pocantico Conference Center at Kykuit, a National Trust Historic Site, April 23-25, 2007. The gathering was hosted by the Rockefeller Brothers Fund and the National Trust for Historic Preservation. Program and planning partners included the American Architectural Foundation (AAF), the American Association of Museums (AAM), the American Association for State and Local History (AASLH), and the National Trust for Historic Preservation. Financial support for the conference was provided by the Rockefeller Brothers Fund, the National Trust for Historic Preservation, the National Endowment for the Arts, and the American Architectural Foundation.

The articles that follow were written by conference participants and invited contributors based on materials prepared for the meeting and on the discussions that took place there. These articles reflect the views of the authors and not necessarily those of other conference participants, the sponsors, or the Rockefeller Brothers Fund.

# INTRODUCTION: THE CALL FOR A NATIONAL CONVERSATION

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By James Vaughan

*The Forum on Historic Site Stewardship in the 21st Century, held in April 2007 at Kykuit, was a significant event for historic site professionals, giving leaders in the field the chance to air concerns and propose responses. This special issue of Forum Journal will first present the report produced after that conference. Then I'll introduce the contributors to this issue of Forum Journal, who are adding their voices to the ongoing conversation that meeting has inspired.*

## **SUSTAINABILITY OF HISTORIC SITES IN THE 21ST CENTURY: THE CALL FOR A NATIONAL CONVERSATION**

### **Final Conference Report, April 2007**

Over the past decade much has been written about declining attendance at our nation's historic sites. At a time when the market for heritage tourism, cultural tourism, and eco-tourism is rapidly expanding, historic sites are drawing fewer and fewer visitors. At the very time when Americans are developing historical amnesia and the need for improved teaching of American history in the schools is critical, historic sites seem to have lost their way. How should the historic site profession (that unique cross section of public history and museum studies) respond to this situation?

In April 2007 a small group of experienced historic site professionals and representatives of professional associations and

selected foundations that support historic sites gathered at the Pocantico Conference Center at Kykuit near Tarrytown, N.Y., for several days of thoughtful discussion about the issues confronting historic sites. For the most part we analyzed and debated how to enhance the sustainability and relevance of historic sites in America's future. The goal of this gathering was to initiate a serious conversation throughout the historic site community of professionals and volunteers about the choices we must make to ensure that our sites provide maximum value to our society and thus remain relevant and useful for future generations. The outcome of the conference was a call for critical discussion throughout the field, and a call for dramatic but responsible changes in some of the most basic professional assumptions and practices that guide the way we do our business. It also urged more experimentation with new models for historic sites and innovative pilots for new, more responsible standards for collections care.

The discussions were stimulating and thoughtful, and there was, in the end, a large degree of consensus about the issues that are limiting long-term sustainability. There was not quite as much agreement about how these issues should be addressed, although even here, the differences were often matters of degree rather than direction.

The assembled professionals recognized that they do not speak for a single association or institution and were not authorized or

empowered by any organized body to issue findings, but there was a strong consensus that we need to communicate our deliberations to the larger historic site community by issuing a “Call for Change” that would carry these discussions to a wider audience.

Although these findings and recommendations were submitted to all Kykuit participants for comment and correction, this does not mean that every participant agrees with every finding and recommendation.

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## A CALL FOR CHANGE

America’s historic sites offer unique opportunities for learning, for reflection, for inspiration. At their best, they can be powerful places that provide great value to their communities. They can offer programs, services, and experiences that are relevant to many of the most pressing issues of our day. America’s historic sites should be places to nurture the human spirit.

Despite this potential, however, many of America’s historic sites are experiencing declining attendance, financial instability, and poor stewardship, and they are increasingly viewed by their communities as irrelevant and unresponsive to the societal changes around them. Those of us who

gathered at Kykuit urge all of us who are engaged in this important work of historic site stewardship to seriously consider the following findings and recommendations.

## FINDINGS

- Successful stewardship of the nation’s historic sites requires financial sustainability.
- Sustainability begins with each historic site’s engagement with its community and its willingness to change its structure, programs, and services in response to the changing needs of that community.
- The long-accepted heritage tourism business model is not a sustainable business model for most historic sites.
- Serving the needs of the local community (not the tourist audience) is the most valuable and most sustainable goal for most historic sites.
- Attendance figures are not the most valid measure of the positive value of the historic site experience or the site’s impact.
- Many professional standards and practices in the historic site field were borrowed from the museum community and, in practice, often deter creativity and sustainability at historic sites.
- New standards of stewardship for historic sites should be modeled to reflect the distinct nature of these places.
- Responsible site stewardship achieves a sustainable balance between the needs of the buildings, landscapes, collections, and the visiting public.



- Caring for the buildings, landscapes, and collections are the means but not the ends of the work of historic sites.
- Innovation, experimentation, collaboration, and a broad sharing of the resulting information are essential to achieving historic site sustainability on a broad scale.
- Undefined collecting coupled with a lack of professional standards and inconsistent practices regarding deaccessioning are an impediment to change and sustainability.
- Over-reliance on program, challenge, and matching grants can reduce long-term sustainability by shifting focus away from operating and endowment needs and by encouraging the growth of non-mission related programs.
- Returning sites to private ownership with proper easements can be a positive means of assuring long-term stewardship.
- Foundations and granting agencies should refocus their philanthropy away from short-term program support to grants that assist sites in building their capacity to sustain themselves for the long term, including general operating support and endowment.
- Foundations should be supported in their efforts to terminate repeated “drip support” to historic sites to focus their support on sites taking positive steps to achieve long-term sustainability.
- Those who educate and develop the leadership of historic sites should amend their curricula to better equip students to deal successfully with rapidly changing realities.
- The major professional associations should encourage, promote, publicize, and recognize experimental and successful models of change and sustainable practices.

## RECOMMENDATIONS

- The AASLH Task Force on Standards should seek to establish an appropriate stewardship balance for the needs of buildings, landscapes, collections, and the public.
- The AASLH Ethics Committee should prepare a positive statement to guide the transitioning of historic sites from public use to private stewardship.
- The National Trust and others should experiment with responsible situational standards for collections, buildings, and landscapes at pilot sites that could serve as models for others, and they should publish their findings as appropriate.
- The profession must develop new measures, beyond attendance, that document the quality of visitor engagement at sites and the extent of community outreach beyond the bounds of historic sites.
- Historic sites must no longer think of the “velvet rope tour” as their “basic bread and butter” program and must generate more varied ways to utilize their remarkable resources to enrich people’s lives.
- The historic site community must reaffirm the importance of these places for our nation’s future and redefine our mission in terms of that future rather than the past.

- Selected sites should develop a pilot process to streamline deaccessioning and share their results with the field.

## AFTER THE KYKUIT CONFERENCE: EXPANDING THE CONVERSATION

A primary objective of the Kykuit conference was to continue and build upon the conversations about historic site sustainability through presentations at professional meetings and through the publication of articles illuminating the findings and recommendations or suggesting new models and solutions. Eight such articles are published here.

In “Historic House Museums: An Embarrassment of Riches?,” Marian Godfrey from The Pew Charitable Trusts discusses the situation of approximately 300 historic house museums in Greater Philadelphia from the perspective of a foundation that has been engaged in assisting them in the search for sustainable solutions over several decades.

In “Crisis or Transition? Diagnosing Success at Historic Sites,” Max A. van Balgooy, the director of interpretation and education at the National Trust, makes the case that we are too focused on admissions numbers as the measure of our success. Instead, he suggests that we need to refocus on more qualitative measures of visitor satisfaction and on measures of financial condition.

David Donath, president of The Woodstock Foundation, suggests in “Funding the Fundamentals,” that many historic sites have drifted far from their original core values and mission, leading to the costly reality of deferred maintenance. He calls for an increased commitment to preservation and stewardship as central values that

should be adequately funded in our annual operating budgets.

In “Cultural Heritage Tourism Trends Affecting Historic Sites,” Amy Webb and Carolyn Brackett, director and senior program associate for the National Trust’s heritage tourism program, attempt to explain why attendance at historic sites is declining even as the heritage tourism market grows. Informed by extensive market and demographic research, they offer their thoughts on how historic sites could better serve the expanding heritage tourism market.

At the Kykuit conference there was considerable discussion about how professional standards and practices appear to stifle creativity and innovation. Katherine Kane, executive director of the Harriet Beecher Stowe Center, in Hartford, Conn., who has served on both AAM and AASLH committees on professional standards and best practices, offers her perspective on “The Impact of Standards on the Sustainability of Historic Sites.” She also describes efforts now underway to reduce the impact of some of the unintended consequences of professional standards.

Among those who see a prosperous future for historic sites — indeed, “A Golden Age for Historic Properties” — are consultants John and Anita Durel. Their article, which was distributed as a “thought-provoking” piece to kick off the Kykuit conference, argues that the cultural tourism business model is not working for most historic sites. They recommend instead a business model that is much more focused on the local community. A longer version of the article appeared in *History News*, Summer 2007. It has generated as much attention in



Participants at the 2007 Forum on Historic Site Stewardship in the 21st Century at Kykuit in Tarrytown, N.Y. Photo courtesy of the National Trust for Historic Preservation.

the field as it did at Kykuit. It's worth a careful read.

We close this special issue with articles about two National Trust Historic Sites that demonstrate two different community-focused business models.

David Young, in "The Next Cliveden: A New Approach to the Historic Site in Philadelphia," describes the process by which Cliveden shifted its focus and mission from the traditional tourist-based model to one of real community engagement. Over a period of several decades Cliveden's neighborhood had changed dramatically but Cliveden had not, until the recent decision to alter its mission, programs, and target audience.

Jim Kern, in "Brucemore: A Cultural Center for Cedar Rapids," describes a site located

in an area not known for extensive tourism that set out from the beginning to serve the local population. The variety of programs is truly remarkable and the site's commitment to its community has produced one of the most sustainable and most beloved historic sites of the National Trust.

We hope you will find this issue of *Forum Journal* to be informative and that it will stimulate you to join this important discussion about the future sustainability of historic sites. Join the conversation at <http://blogs.nationaltrust.org/preservationnation/>.

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# HISTORIC HOUSE MUSEUMS: AN EMBARRASSMENT OF RICHES?

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By Marian A. Godfrey

In 2002 Richard Moe wrote an article for this journal titled “Are There Too Many House Museums?” Back then some historic preservation experts thought the answer was “yes,” but most were too polite to say so. The question was an urgent one for The Pew Charitable Trusts, which has a long-standing commitment to the preservation of historically and aesthetically important buildings and sites in the Philadelphia region, and has provided more than \$17 million in funds for preservation-related projects over the past ten years alone. In 1998 Pew created the Heritage Investment Program (now the Heritage Philadelphia Program — HPP) with the objective of directing our investments in a more focused and effective manner. HPP, under the leadership of then program director Barbara Warnick Silberman, took a systematic look at historic preservation needs in the Philadelphia region, particularly with regard to historic house museums. What HPP learned is that many of these museums are in peril, and the situation in Philadelphia is representative of a looming national crisis.

There are approximately 300 historic house museums and sites in the Philadelphia area. They are a vital part of our community. They are the tangible reminders of our history, where we came from, and who we once were. Spanning centuries, these buildings help us understand the people who made Philadelphia and our country great, how they lived and how they experienced many of the same challenges and triumphs we face today. They are a legacy of the commitment of earlier generations of

community-proud citizens who banded together to save old homes, farms, and country estates from the wrecking ball. And their success in preserving the physical fabric of our region’s history has enriched the landscape and enhanced Philadelphia’s reputation as a place where residents and visitors alike can connect their present to their country’s past.

But today most local house museums confront enormous challenges that threaten their sustainability. Few have professional staff, and most of the volunteers who govern and operate them are at or over retirement age, with no new leadership in sight. Only

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[U]ntil now, most historic houses have been preserved strictly for the buildings’ sake. This has led to a troubling surplus of sites that are under-used and hopelessly disconnected from the beating hearts of their communities.

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a small fraction have annual visitation of more than 1,000; for many, holiday tours or tours by appointment are their only public programming. At least 80 percent are faced with \$1 million or more in preservation and deferred maintenance needs, yet their operating budgets are typically \$100,000 or less. How will choices be made about which of these organizations survive into the future, and who will make those decisions?

No question, historic homes are worth saving. Preservation is vitally important if we as a nation hope to retain authentic examples of history, culture, and place. But until now, most historic houses have been preserved strictly for the buildings' sake. This has led to a troubling surplus of sites that are under-used and hopelessly disconnected from the beating hearts of their communities. Attendance is dwindling, operating costs are soaring, and devoted stewards are leaving without being replaced. These structures need to be re-purposed in order to be revitalized. It is time to create alternatives to the museum model for preserving at least some of our important but endangered historic houses, and to transform them into productive buildings that truly serve their communities. But how to go about this transformation?

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Digital technologies are creating new cultural frontiers. Today members of the first generation of “digital natives,” born in 1985 or later, develop their own creative content and distribute it online through social networks.

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## **HISTORIC HOUSE MUSEUMS IN THE 21ST CENTURY**

It is important to note that the difficulties faced by many historic house museums are due in large part to a rapidly changing arts and cultural environment. Consider, for example, how much greater the opportunities for cultural engagement are today than they were in the era when most historic house museums and many other types of history organizations were formed. Digital technologies are creating new cultural

frontiers. Today members of the first generation of “digital natives,” born in 1985 or later, develop their own creative content and distribute it online through social networks (see the Pew Internet and American Life Project, [www.pewinternet.org](http://www.pewinternet.org), for data on how teens and others use the internet). These “millennials,” as market research has dubbed them, expect to have significant involvement with and capacity to shape cultural content.

Demographic shifts are also changing the environment for cultural programming. They are exacerbating the already problematic lack of alignment between available cultural offerings and the heritages and interests of growing and diverse minority populations (which will no longer be in the minority in the United States by 2050 or sooner). In the city of Philadelphia, for example, few house museums interpret the history of African Americans, who make up 45 percent of our population. Their hunger for stories about Philadelphia's past with which they can identify fueled a huge outcry over Independence National Historical Park's refusal to memorialize the first president's house, originally occupied by George Washington and a household that included nine enslaved persons, and subsequently by the anti-slavery president John Adams. (The house was torn down in 1832.) After five years of organized effort on the part of local activists, the site has been excavated and plans are now being developed for a memorial.

Many philanthropies and public charities, including Pew, are concerned about the accelerating pace of change in the environment for arts and culture, and are searching for answers about what philanthropy's role should be in assisting cultural organizations to respond to these turbulent times.

## RESPONDING TO FINANCIAL VULNERABILITY

Undercapitalization of nonprofit cultural organizations of all kinds is a pervasive problem. In Philadelphia, the cultural sector has grown exponentially in recent years. In 2004 alone, 1,000 organizations received 12 million visits. But also in that year, almost half of Philadelphia organizations had operating deficits, and more than a quarter had deficits of more than 10 percent of operating revenues. Many house museums and other organizations are in crisis, unable to do the very thing most important to their ability to serve their community: to respond to the changing environment by reinventing themselves programmatically.

Supporters and advocates who want to make a positive difference face few options. They can make significantly more aggressive investments in capitalizing the subset of organizations deemed truly essential to a given community. They can encourage organizations to consider partial or complete mergers, or assist some in going out of business. Some combination of the two approaches would be optimal. The Darwinian alternative — changing nothing — will keep many struggling organizations on their current drip feed of small gifts and grants, insufficient to allow them to thrive yet often binding them to untenable promises to deliver programming. But for transformational change to be successful, community-wide efforts would need to be made to identify the interventions most likely to be successful, to form collaborative partnerships, and to aggregate the necessary resources.

## AMERICA'S CULTURAL VALUES

Perhaps most troubling of all, agreement about what we value in our culture has

eroded. (See “Cultural Value and the Crisis of Legitimacy,” by John Holden, © 2006 at [www.demos.co.uk](http://www.demos.co.uk) for useful discussion of this topic.) The arguments in favor of

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Many house museums and other organizations are in crisis, unable to do the very thing most important to their ability to serve their community: to respond to the changing environment by reinventing themselves programmatically.

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providing access for all Americans to arts and cultural experiences, which led to the creation of a system of public agency subsidies for the arts and humanities in the 1960s and 1970s, have ceased to be effective. The cultural boom of the past 40 years has created a glut of both commercial and nonprofit cultural offerings that now reach into every corner of our communities (though what is on offer is not necessarily what any given community most desires). Furthermore, beginning in 1980, the “Reagan Revolution” has driven our society toward an ever more market-based definition of cultural value. Until cultural organizations get better at listening and responding to the needs and desires of audiences and the general public, we will be unlikely to argue effectively that what we are providing to them has true value and should be supported.

## PEW'S RESPONSE

Through its Heritage Philadelphia Program (HPP) The Pew Charitable Trusts has undertaken two initiatives to help historic house museums and other history organizations respond to the challenges and opportunities



Mill Grove, the home of artist and conservationist John James Audubon from 1803 to 1806, has made the transformation from a house museum to an exhibition space and a community cultural center. Photo courtesy of John James Audubon Center at Mill Grove.

of the 21st-century environment. Former HPP director Barbara Silberman developed and led the Living Legacy Alternative Stewardship Project, jointly funded by HPP and the William Penn Foundation. As Ms. Silberman points out, stewardship of historic house museums and sites is no longer simply a matter of saving them from the wrecking ball. Today their supporters and the general public expect regular access and a robust calendar of events and educational programs.

Clearly it is time to find alternative stewardship arrangements for many of these houses, uses that will allow them to continue contributing to the visual, architectural, and historic fabric of their surroundings. Since these houses were originally built to be lived in by families, for many the most productive use is likely to be a return to private owner-

ship and residential use, with exterior easements to protect the quality of life of the surrounding community, along with exterior interpretive panels that can capture their stories. Such solutions allow historic house museums to return to the care of owners who are more invested both emotionally and financially in stewardship and preservation of these properties.

HPP also worked closely with preservation consultant Donna Ann Harris, whose new book *New Solutions for House Museums* (Alta Mira Press, 2007) chronicles how a dozen sites in the U.S. and Canada converted into community-centered spaces while keeping preservation a top priority. Trustees of both rural and urban sites refitted and reopened them as art galleries, bed and breakfasts, and conference centers, used and appreciated by the public daily.



In Philadelphia, the Living Legacy Project worked with six house museums to develop and implement strategies for reinvention. The most successful example is the Mill Grove estate, the first American home of famed artist and conservationist John James Audubon. Owned by Philadelphia's suburban Montgomery County government and managed by the National Audubon Society, Mill Grove is an 18th-century fieldstone farmhouse perched on a leafy bluff overlooking Perkiomen Creek. The 175-acre estate includes the main house, a barn, and five miles of walking trails. But the house's interior has not been historically accurate for at least 40 years, and the cost of meticulously restoring the 1765 structure would be astronomical.

As part of the HPP project, Mill Grove's director, Jean Bochnowski, and board members spent about five months visiting other historic house museums learning the administrative details of alternative stewardship and weighing their options. "The tours convinced us we didn't want to be a museum any more, where people just walk in and stand passively," Bochnowski says. "We agreed that, given John Audubon's role as a conservationist, the interior of the house wasn't as important as the exterior. Especially since there's something about how Mill Grove sits in this environment that touches people; there's a majesty about it."

One part of the historic Mill Grove home that visitors insist on seeing, she says, is the re-creation of Audubon's bedroom. After that, their attention wanes. "So we decided to keep the bedroom as it is and turn the rest of the house into an art center," she says. "We want it to be a vibrant place with art classes, visiting exhibits, and an

artist in residence. We think it speaks to Audubon's legacy — learning about nature through art." Plans call for the original Audubon drawings and paintings owned by the center, and currently displayed inside the house, to be permanently moved next door to a three-story barn that will be remodeled into a climate-controlled museum, tying the art into a larger story of nature conservancy. Mill Grove's transformation from a house museum to a hybrid organization including exhibition space and a community cultural center is an inspiring example of how thoughtful consideration of an organization's curatorial and educational potential can result in positive transformation.

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Clearly it is time to find alternative stewardship arrangements for many of these houses, uses that will allow them to continue contributing to the visual, architectural, and historic fabric of their surroundings.

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In 2006 Paula Marincola, the current director of Pew's Heritage Philadelphia Program, seeking guidance on how Pew could support history organizations in the region to bring their stories alive for today's visitors, commissioned Barbara Schaffer Bacon and Pam Korza of Americans for the Arts' Animating Democracy project to study the interpretive practice of history organizations, including historic house museums, in Philadelphia and nationally.

It turns out that Philadelphia is reflective of the national picture: We have a small number of exemplary organizations along with the many that struggle. In an internal

report prepared for the Heritage Philadelphia Program, “Interpretive Practice in History Organizations: Philadelphia in a National Context,” Schaffer Bacon and Korza conclude that exemplary practices aim to build relationships and situate history organizations genuinely as civic and



Families gather around Mill Grove's bat house for the popular Bat Night Program, one of the many environmental education programs offered by the John James Audubon Center at Mill Grove. Photo courtesy of John James Audubon Center at Mill Grove.

community institutions by relating history to personal experience and contemporary issues; include multiple viewpoints and truths; and share authority with community members as advisors and co-developers of programming.

Some history organizations are integrating art and artists into their programming, and they have discovered that art is a potent entry point for connecting personal experience with historic events and contemporary issues. Others have focused on institutional reinvention, pursuing alliances and mergers

when there is congruence of mission, compatibility of collections, and political will within their governing bodies. HPP has now significantly revised its program strategy and guidelines to assist historic house museums and other history organizations to identify and pursue the innovative interpretive practices and institutional reinventions most appropriate to their situation and mission.

Extreme makeover? Or just a correction in vision? Whichever path is followed, thoughtful, honest consideration about what constitutes appropriate stewardship of our historic legacy in the 21st century will be the key to successful preservation efforts. The result will be the creation of productive facilities that once again work as vibrant components of their communities, and are places that people want to see and be.

Marian A. Godfrey has led the Culture program of The Pew Charitable Trusts since 1989 and has developed and implemented several history and preservation initiatives during that time.

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# CRISIS OR TRANSITION? DIAGNOSING SUCCESS AT HISTORIC SITES

By Max A. van Balgooy

At the 2007 Forum on Historic Site Stewardship in the 21st Century at Kykuit, we never determined whether there is a crisis facing historic house museums. We shared lots of anecdotes and strong opinions, but there was no consensus. A few days later, George McDaniel (executive director of Drayton Hall in Charleston, S.C.) and I taught a workshop on historic house museum management in Massachusetts for the American Association for State and Local History, so I asked the group, “If you continued operating in the same manner as you are today, would your organization be in crisis in five to ten years?” Of the 25 different historic house museums represented in the room, only one person raised her hand — and her site had just suffered a major fire. Some might venture to guess that these groups refused to recognize the serious situation that faced them. Others might say this proves most historic house museums aren’t in any danger, and obviously they’re working on improving their situation because they’re engaged in training. Despite the contradictory opinions, it does verify one of the major recommendations from the Kykuit Forum — the need for detailed examinations and more research.

In an attempt to suggest where we might look for answers, I’ve been reviewing the areas that many leaders in the field suggest are either symptoms or causes of the difficulties facing historic house museums. The crisis is different depending on where you look and with whom you speak, but ultimately it focuses on two key areas — attendance and finances — and raises a fundamental question: How do we measure success?

## ATTENDANCE REIGNS SUPREME

In its various forms, public participation is the most frequently cited statistic to gauge success, whether it’s magazine circulation, church membership, hotel occupancy, or website visits. For a historic house museum, visitor attendance is a key factor in determining its health. Newspapers have used declining attendance at Colonial Williamsburg, Old Sturbridge Village, and the Newport Mansions to imply failure, or the predicted record-breaking crowds at Mount Vernon, Lindenwald, and Valley Forge to signal progress.<sup>1</sup> This puts most historic house museums in a tough spot because it suggests that if these hallowed sites are threatened, or

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Attendance shouldn’t be the only measure of success and it isn’t the most reliable.

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if success is possible only through magical high-tech exhibits, stunning visitor centers, or painstaking restoration (and the megamillions needed to complete them), it can only spell doom for the rest of us.

But here’s the reality: *Attendance shouldn’t be the only measure of success and it isn’t the most reliable.*

First of all, if we put historic house museums in a larger context, we’ll see their experience isn’t so unusual. According to Roger Putnam, professor of public policy

at Harvard University, membership in museums, attendance at symphonies and operas, playing on softball teams or in bowling leagues, and participation in service clubs and PTAs have been trending downward for *decades*. In *Bowling Alone*, his careful study of community life in the United States, Putnam states that

For the first two-thirds of the twentieth century a powerful tide bore Americans into ever deeper engagement in the life of their communities, but a few decades later — silently, without warning — that tide reversed and we were overtaken by a treacherous rip current. Without at first noticing, we have been pulled apart from one another and from our communities over the last third of the century.<sup>2</sup>

The causes cited by Putnam and others are legion and seemingly insurmountable: influence of television, home entertainment, and the internet; changing demographics; increasing work demands and decreasing leisure time; expanding roles of women; and shift in mode of vacation travel from automobile to air.<sup>3</sup>

Perhaps there's some reassurance that we're not alone in our struggles, but we're also caught in a dilemma. If attendance at historic sites is declining, it goes against other major trends of growth. The National Endowment for the Arts' decennial survey shows that visitation at historic sites has grown 6 percent since 1982.<sup>4</sup> According to the Travel Industry Association, travel volume has grown by more than 10 percent over the past decade and most adults included a cultural or historic activity while traveling — this currently represents nearly 120 million people.<sup>5</sup> A nationwide study showed that Americans have a broad interest in heritage

and regularly participate in historical activities.<sup>6</sup> Even outdoor enthusiasts stated that along with walking and jogging, they most enjoyed visiting historic sites.<sup>7</sup>

Unfortunately, national statistics on attendance at historic sites aren't widely available, reliable, or consistent, so most of our information is anecdotal.<sup>8</sup> My study of attendance at two dozen National Trust Historic Sites shows that walk-in daily attendance for 1998–2005 (which includes 9/11) is flat overall. But like the stock market, when you examine performance at individual sites, it's a different story. For two-thirds of the sites, attendance declined for five or more consecutive years. Conversely, attendance at one-third of the sites has increased for five or more consecutive years. There seems to be no obvious pattern to explain these differences — not location, changes in management, catastrophic events, staffing, endowment, or assets.

It further demonstrates the inability of attendance figures by themselves to explain success or failure. Certainly having no visitors is a bad situation, but having little knowledge of our visitors may be even worse. It's like a restaurant noticing that sales are down, but not knowing whether it's happening at breakfast, lunch, or dinner, or due to the food, service, price, or neighborhood. In order to make any meaning out of attendance, we need to refine our measurements by recording a visitor's demographics and behavior (e.g., age, residence, repeat visit) against the site's programming (e.g., tours, events, site rentals) consistently over several years.

Now if we really want to expand our thinking, historic house museums should move beyond quantitative measures to qualitative ones. The National Trust for



To enhance the visitor experience, tour groups visiting the Philip Johnson Glass House in New Canaan, Conn., are purposely kept small so that the house is empty when first encountered by visitors and the presence of other people is minimized when inside. Photo by Max A. van Balgooy.

Historic Preservation has established “engaging one million people” as one of its strategic goals. Although some have quibbled about the number, it is “engagement” that’s caused the greatest stir. Simply counting attendance or membership numbers isn’t sufficient. To be “engaged” with the National Trust, the activity must advance our mission and have occurred in the last 24 months, and participants must recognize they have engaged with the National Trust for Historic Preservation and must provide their contact information so we can continue the relationship. It’s a major shift in thinking, because getting people to become members or pay admission is not the goal but a means to a larger one: the protection, enhancement, and enjoyment of places that matter to them.

Other qualitative measures include expanding the idea of preservation beyond

the buildings to include the visitor experience. Although located on 47 acres, the visibility into and out of the Philip Johnson Glass House in New Canaan, Conn., is a paramount experience that can be spoiled by just a handful of visitors. We at the National Trust have thus carefully orchestrated the tour schedule and reduced the group size so that the house is empty when it is first encountered by visitors and the presence of other people is minimized when inside. This self-imposed limit on capacity has resulted in sold-out tours and lots of buzz for the first two years but also created frustrations for people who are unable to visit. In this instance, public access is trumped by visitor experience — not many historic house museums are willing to take that stand.

Moreover, research on our visitors is causing us to rethink assumptions about what

is important to them. Surveys at Decatur House in Washington, D.C., suggest that visitors to historic sites are not the same as those who visit other types of museums,



National Trust sites, such as Lyndhurst pictured above, are exploring other ways of measuring success in addition to attendance, such as staff time required, mission relevance, and local community appeal. Photo by Max A. van Balgooy.

including history museums.<sup>9</sup> This probably means that strategies adopted by these cultural institutions may not succeed at historic houses because they attract different audiences; thus museum-like activities, such as films and exhibits, may not increase attendance over the long term.

Interviews with visitors to James Madison’s Montpelier in Virginia show that touring this rural historic site is not the sole activity for the day but part of a longer itinerary that includes exploring Monticello, shopping in a nearby town, eating in a local restaurant, and visiting a winery.<sup>10</sup> Visitors don’t want to be at a historic site all day but just a couple hours, so they have time to do other things. Offering a menu of specialized activities and expecting most visitors to stay

throughout the day is probably unrealistic, and it would be more productive to promote complementary local attractions.

Finally, we are also introducing other ways to measure success. At Lyndhurst, in Tarrytown, N.Y., each activity is now being evaluated afterward more broadly. In addition to attendance, the site tracks revenue, donations, expenses, and profitability. It also judges its activities by qualitative factors on a scale of low to high, such as staff time required, mission relevance, cross-marketing opportunities, and local community appeal. This set of measures helps staff decide annually which activities to pursue, how they can be improved, and what to eliminate.

In addition to Lyndhurst, we are currently working with Decatur House, Drayton Hall, and Shadows-on-the-Teche (La.) to develop measurable objectives in advance for program planning and visitor experience. This has been a difficult process because board members and staffs often disagree about their mission and what visitors should learn and experience. We often could not go beyond vague immeasurable statements that began with “discover,” “understand,” “appreciate,” and “enjoy.” At some sites consensus was reached with hesitation, and at others it was impossible. This exercise suggests why so many historic sites thus rely on attendance — it’s hard to quibble about numbers and everyone assumes that more is better. As a result, we’ve painted ourselves into a corner, asking the public to support us for work that can’t be judged or evaluated except through the least reliable method: attendance.

## MONEY IN A NONPROFIT WORLD

As nonprofit organizations, historic house museums dislike talking about money and

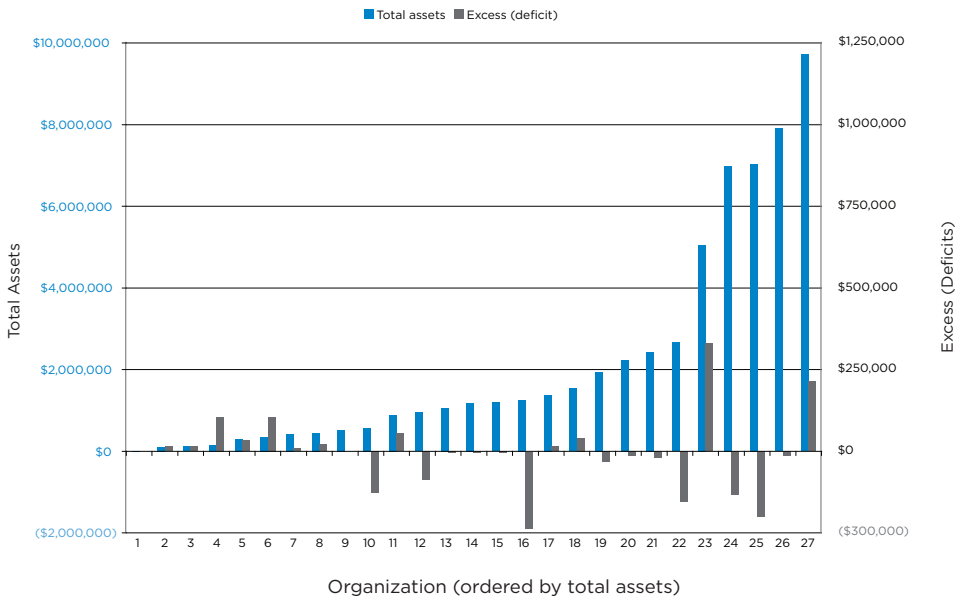
find discussing financial struggles difficult. Yet historic sites need funds to survive and grow, and fundraising consumes most of a board's and site director's time. At the Kykuit Forum, we deliberately avoided a conversation about funding because we feared it would devolve into endless discussion on the lack of money and a mere sharing of woes. We agreed that funding and capitalization at historic house museums is weak but more money wouldn't solve our major challenges. Indeed, an initial financial analysis suggests that it may even make matters worse.

In order to gain a better understanding of the finances at historic house museums, I analyzed the annual financial reports of 27 nonprofit organizations across the United States that manage historic houses and whose assets range from \$5,000 to \$10 million.<sup>11</sup> One measure of a potential crisis

is a deficit — spending more than you earn. Surprisingly, more than half of the organizations ended 2005 with a deficit.<sup>12</sup> Even more startling is that deficits are *more* prevalent for those organizations with assets over \$500,000 than for the smaller organizations. The situation doesn't simply grow worse as the assets increase; it's the organizations in the middle range that have the biggest struggle.

Organizations with assets between \$500,000 and \$2.5 million not only face deficits more frequently but the magnitude is much greater. A worst-case example is the Susan B. Anthony House in Rochester, N.Y., (#16 in the chart below) which had assets of \$1.3 million and annual revenues of \$181,278 in 2005, but had expenses of \$464,484, leaving an operating deficit of \$276,206 — more than 20 percent of its assets.<sup>13</sup> That's a serious financial situation that will require years of recovery, even if it's a one-time inci-

**Historic House Museums Financial Condition, 2005**



dent and now fully under control. Although this organization's experience is extreme, it is not uncommon. The one glimmer of hope is that in larger organizations (those with budgets of over \$2.5 million), the financial deficits are much smaller in proportion to their overall assets and thus deficits are not as threatening to the organization's viability.

A closer analysis shows that the financial situation changes as the organization's assets increase.<sup>14</sup> Small organizations (assets of less than \$500,000) rely primarily on donations rather than earned income and their financial situation is fragile. Loss of a grant or major donor can seriously squeeze operations, and a major emergency or expense could mean bankruptcy. Yet they seem to be extremely resourceful and better able than larger organizations to provide more programming at lower cost, they rarely have deficits, and they regularly place surplus funds into reserve.

One could assume that large organizations (assets of more than \$2.5 million) would have overcome these challenges; however, they not only have many of these same problems but many more. Large organizations have mastered some areas of financial management. Financial deficits are common but are smaller in relation to overall assets, thus are not as threatening. Large organizations also have diversified their income sources and are better able to adapt to changes in the economy. A greater proportion of their assets are difficult to liquidate, typically tied up in real estate or restricted endowment funds. This lack of flexibility contributes to increased challenges in cash flow, which makes it more difficult to pay ongoing operational expenses, expands the use of credit, and places a greater emphasis on professional fundraising.

Medium-sized organizations (assets between \$500,000 and \$2.5 million) have complex finances that require continual monitoring. They've increased income from admission fees, retail sales, membership dues, rentals, and investments so that they are no longer primarily supported by donations and no longer subject to the whims of an individual donor or the winds of politics. This diversity allows them to respond more flexibly to emergencies or changes in the economy, but it also makes financial management much more complex and they seem to have increasing difficulties in managing cash flow and protecting cash reserves. As a result, deficits become more common, the use of credit is expanded, and expenses are shifted from programming to administration and fundraising.

Which of these organizations are in financial crisis? All of them would welcome more money and we could speculate how they would handle an extra \$1 million — but for some, that probably would not solve the crisis. I suspect that organizations of medium size would return to a state of trouble because they appear to have the most difficulty in managing finances. Administering the finances of these institutions is particularly complex because income sources are so diverse and expenses so numerous that a single person can no longer adequately monitor them. Mid-range organizations require more careful management by several experienced staff members, which requires uncommon skills and expertise, the delegation of authority, good teamwork, and higher salaries. At the same time, assets have grown to a point to make staff and trustees more complacent. They may assume that daily cash shortfalls can be addressed by purchasing on credit or by quick fundraising and that any serious



problem can ultimately be solved by laying off staff, digging into the endowment, or selling surplus assets.

Financial mismanagement can put an organization into crisis; however, from my studies of award-winning programs and consultation with dozens of historic house museums across the country, no correlation exists between size of assets and professional performance. There are some organizations with huge endowments that do little more than dull guided tours of stagnant period rooms. Others struggle to pay utility bills and yet manage to produce popular events, engaging websites, and outstanding school programs. Wealth does not hold a monopoly on performance or success.

## MEASURING SUCCESS

Attendance and financial assets are not the best ways to measure success but we're only beginning to determine alternatives. As the Kykuit Forum recommended, we "must develop new measures, beyond attendance, that document the quality of visitor engagement at sites and the extent of community outreach beyond the bounds of historic sites." This should include more frequent and comprehensive visitor research as well as a comparison of costs to benefits, attendance to capacity, and program participation to market size. Furthermore, it must include qualitative as well as quantitative measures to adequately evaluate performance. Agreement on criteria other than attendance will be a difficult task, but if we avoid the challenge of examining our value and benefit to society, we do not deserve its support.

The Kykuit Forum also recommended that grant-making organizations "focus their support on sites taking positive steps to

achieve long-term sustainability" — and I hope that will include improved training for staff and boards in strategic planning and financial management. Historic sites are complex organizations and yet there is little financial support for projects other than educational programs, new initiatives, and building restoration. Funders and

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If we avoid the challenge of examining our value and benefit to society, we do not deserve its support.

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donors should examine organizations more holistically and ensure that they are addressing all aspects of organizations' operations in some manner. *Crisis* is a frightening word because it can mean an unstable and uncertain situation that can spell doom. In German, it's sometimes called *torschlusspanik*, or the fear of being on the wrong side of a closing door. But perhaps we can adopt the alternative usage from the medical profession, which means the turning point in a disease. Historic sites may be currently ill at ease but there is still hope for recovery and good health if we make a good diagnosis.

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<sup>1</sup>Laura Tillman, "Thank the Museums for the Malls: Cultural Institutions Attract Companies, but Struggle for Visitors," *Brownsville Herald*, December 8, 2007; Carlos Santos, "A view of the past that's more complex, inclusive: Museum to weave story about Africans, Indians in America's early days," *Richmond Times-Dispatch*, December 3, 2007; Tracie Rozhon, "Homes Sell, and History Goes Private," *New York Times*, December 31, 2006; Elizabeth Kolbert, "Van Buren's House is a Home Once More," *New York Times*, June 2, 1988; Edward Rothstein, "More of Washington, but Still Mysterious," *New York Times*, October 27, 2006; Brian MacQuarrie, "Living History Attraction in Sturbridge, Mass., Falls on Hard Times," *Boston Globe*, November 2, 2003; Bill Van Siclen, "Newport's Gems Lose a Bit of Their Shine: In its 60th year, the Preservation Society of Newport County Struggles to Shore up Steady Erosion in the Number of Visitors to its Gilded Age Mansions," *Providence Journal*, August 7, 2005; Annie Gowen, "Old Places, New Marketing; As Visits to Historic Sites Approach Historic Lows, Officials Make Cuts and Look for Fresh Funding," *Washington Post*, April 27, 2003.

<sup>2</sup>Roger Putnam, *Bowling Alone: The Collapse and Revival of American Community* (New York: Simon and Schuster, 2000), page 27.

<sup>3</sup>Putnam, *Bowling Alone* (2000); Juliet Schor, *The Overworked American: The Unexpected Decline of Leisure* (Basic Books, 1991); Ron Crouch, "Rules for a New Demographic Ballgame" *Museum News*, May/June 2004, pp. 43 ff; and Bruce Courson, "Why Rural Museums are Becoming Ancient History," *Opinion Journal*, December 27, 2005.

<sup>4</sup>2002 Survey of Public Participation in the Arts (National Endowment for the Arts, July 2003). Please note that "Historic Sites" includes parks, monuments, historic buildings, and neighborhoods and the data relies on the self-reporting of survey participants.

<sup>5</sup>*Historic/Cultural Traveler* (Travel Industry Association, 2003).

<sup>6</sup>Roy Rosensweig and David Thelen, *The Presence of the Past: Popular Uses of History in American Life* (New York: Columbia University Press, 1998).

<sup>7</sup>*Think Outside: Promoting Natural Assets and Experiences in the Philadelphia Region*, Osiris Group, Inc. (Philadelphia: Greater Philadelphia Tourism Marketing Corporation, 2005).

<sup>8</sup>Museums not only differ on terms (e.g., "children" is defined by differing age ranges) and activities measured (e.g., tours, school programs, events, site rentals, off-site activities, website visitors) but the same organization will change these over time. Furthermore, museums rarely release detailed information and only report aggregate numbers in their annual reports.

<sup>9</sup>Randi Korn and Associates, "Audience Research: Visitor Survey Prepared for the Stephen Decatur House Museum," (National Trust for Historic Preservation, 2006).

<sup>10</sup>Randi Korn and Associates, "Audience Research Results from In-depth Interviews with Adults Prepared for James Madison's Montpelier," (Montpelier Foundation, 2006).

<sup>11</sup>Financial data is based on IRS Form 990 for 2005, the latest complete year available online at [Guidestar.org](http://Guidestar.org). This analysis is not statistically valid; however, this preliminary study suggests issues that should be explored further.

<sup>12</sup>Organizations with deficits may be difficult to identify in the chart at this scale, so for clarification they are numbers 1, 9, 10, 12, 13, 14, 15, 16, 19, 20, 21, 22, 24, 25, and 26.

<sup>13</sup>For organizations that incurred deficits in 2005, the average rate was that deficits represented about 5 percent of assets.

<sup>14</sup>This analysis is intended solely as a broad comparative overview rather than the evaluation of an individual organization. Furthermore, this analysis is based on a single year and a comparison over a longer period would uncover idiosyncratic events and identify additional patterns.

<sup>15</sup>Although the idea of strategic planning has been widely adopted, it is typically poorly designed and executed. Randi Korn suggests a better approach in her article, "The Case for Holistic Intentionality" in *Curator* 50:2 (2007), pp. 255 ff.

# FUNDING THE FUNDAMENTALS

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By David A. Donath

During the second half of the 20th century, historic house museums, historic sites, and outdoor history museums proliferated across the country. Most were founded on the premise that transforming a historic building into a historical museum would be a good way of ensuring its preservation. Often it seemed that the best or even the only way to rescue an endangered historic building was to make a museum out of it. Not only would the building be under the control of preservation-sensitive nonprofit museum people, some of them expert curators, but the historic place would become an educational resource, open to the public and to schoolchildren, and a celebrated public resource.

I built my career on this idea. Early on, I fled the regulatory world of state historic preservation offices for the seemingly more fertile field of historic sites and outdoor museums. Now after 30 years of laboring in the historic preservation and history museum vineyards, I am increasingly troubled by the preservation fate of many historic site museums. I remain fascinated and passionately drawn to these places, but my answer to the question of whether museum use is ideal preservation is, at best, “it all depends.” At worst such marriages can lead to disaster, or, more commonly, gradual impoverishment and deterioration, both for the historic resource and for the museum. Often the difference between best and worst has to do with the ability and the discipline of a nonprofit organization to “fund the fundamentals” — fundamentals that are often gritty, expensive, and in competition

with lofty educational goals and compelling historical programs.

Historic sites and outdoor history museums are founded around the love of the places and stuff of history and around the potential of these places to contextualize our past — informing and inspiring us, and helping us to educate our children. Often they are rooted in the vision and efforts of volunteers and amateurs, who, despite the addition of professional staffs of curators and educators, must sustain ongoing governance and fundraising efforts. Their missions and purposes are rooted in museological ideals that, in a nonprofit environment of fiscal scarcity, often compete with, and sometimes even conflict with, business principles.

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[M]y answer to the question of whether museum use is ideal preservation is, at best, “it all depends.”

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## A FAMILIAR STORY

When a historic building becomes endangered and a candidate for a preservation effort, it is often because the business-based conditions under which it was built and thrived have changed. Perhaps it has outlived its occupants, and its neighborhood has evolved in a negative economic direction... or its neighborhood’s prosperity has left it in the path of new development... or its downtown is dying, strangled by peripheral mall development... or the old school or library

has been abandoned for a shiny new suburban model. “The numbers” no longer make sense — often, they haven’t made sense for a while. The cost of keeping up the old place always was high, and lately money for maintenance has been scarce. The old building has seen better days.

In an upwelling of civic pride and genuine historical vision, leaders emerge saying, “We can save this important relic!” And others say, “We’ll help!” A new historic site is launched, with the best of intentions. But the problems of the building and its maintenance backlog often remain. Still, the new nonprofit is energetic and creative, and it has passion for the potential of the historic place. It devotes heroic amounts of energy and raises cash to launch the project. It often acquires collections of historical objects to furnish the place or to exhibit in its seemingly abundant space. “If we restore it, they will come — and they’ll help pay for it!” they say and believe. And “they” do come, in numbers at least large enough to inspire the faithful to create

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Although Americans love history, our audiences are shrinking or distracted by leisure alternatives.

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worthwhile interpretive and educational programs. Their numbers are also large enough to wear out the historic floorboards that have thus far survived more than a century. They pay admission, although not quite enough to fully support the worthwhile interpretive and educational programs, and never quite enough to replace those worn-out floorboards, or the failing roof, or the rotting sill, or the....

After a few years, with the place really beginning to look shabby, the board of directors mounts a heroic capital campaign that enables the organization to spruce the place up. They give it a fresh coat of paint, confident that with the place looking better, they’ll be even more successful in attracting future supporters. Meanwhile, donations of historical objects keep pouring in.

The story has been told over and over again throughout the country, in big institutions and small community start-ups, in private organizations and in public institutions, at the local, state, and federal level. In 2004 the General Accounting Office estimated the National Park System preservation maintenance backlog at between \$4.0 and \$6.8 billion. Meanwhile, the historic barn at your local historical society is in imminent danger of collapse from foundation failure and sill rot brought on by repeated flooding; the docents have removed most of its artifacts to temporary storage in the basement of the society’s historic farmhouse, which is also in the flood plain but has a sump pump. In 2005 a nationwide study of the condition of America’s collections, many of which are housed in historic sites and museums, found a dismal situation: 65 percent of collecting institutions have damaged collections due to improper storage, and 40 percent of institutions have no funds allocated in their annual budget for preservation and conservation.<sup>1</sup>

Our historic sites and historic house museums are in trouble. Although Americans love history, our audiences are shrinking or distracted by leisure alternatives. Governmental support is scarce and often shrinking. Philanthropic support may be stable, but it is unlikely to grow enough to meet the need. Concerned professionals are

talking about alternatives: “Maybe there are too many historic house museums.” “We certainly don’t need more of them.” “How can we help the unsustainable ones appropriately to transform themselves, or even to go out of business?” But what *are* we to do about the historic sites and museums that are worthwhile and *can be* sustainable? What about the important new ones that truly ought to be created? In our concern for a field that may indeed be overextended, should we close the door on the possibility of new and brilliant historic sites? I don’t think so.

## MAKING A COMMITMENT TO STEWARDSHIP

To be a true preservation steward of a historic place, the institution that holds it must achieve sustainability. To achieve sustainability, a historic site or museum must realistically put its assets, opportunities, and obligations in balance, both for the present and long into the future. It must provide both for its current needs and for its long-term needs. Its historic property is often both its home base and the basis for its existence — it may at once be its greatest asset and its greatest liability. The obligation to preserve and conserve must be core to its purpose and its mission. If this is true, then the site or museum must address fundamental preservation needs in fundamental ways. If preservation is core to its purpose, it must be made core to its operation, its budget, and its strategic planning. Although necessary and worthwhile, funding of this kind of sustainability can be a major challenge to a nonprofit institution. The degree to which an institution can meet this challenge may be a touchstone for whether or not acquisition or holding of a historic building is a good idea, either for the build-

ing, for the institution, or for the public trust upon which the institution depends.

Unfortunately, the physical needs of historic properties generally are mundane. Their problems are often insidious, hiding behind panels and walls, lurking in attics and musty basements, and concealed all around the landscape. And they are seemingly endless. In the environment of financial scarcity

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... the site or museum must address fundamental preservation needs in fundamental ways. If preservation is core to its purpose, it must be made core to its operation, its budget, and its strategic planning.

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and programmatic urgency in which many historic sites and museums operate, major preservation maintenance lacks the excitement of an innovative new exhibit or program, and it lacks the appeal of staff and operating needs. By default, it’s all too easy to defer. Too often, it is an early casualty in budget cutting — if it makes it into the budget at all. After all, the building is not going anywhere; its problems will still be around next year (and the year after). Sometimes, physical preservation needs are so big as to overwhelm an annual operating budget. With fatalistic sighs of relief and desperation the board and staff consign them to once-and-future capital campaign plans.

But if historic sites and museums are to be sustainable preservation stewards, they must address their ongoing (indeed endless) historic preservation and conservation obligations in their annual operations and their

strategic (and opportunistic) planning, as well as in their capital fundraising. Annual operating budgets should include renewal and replacement allowances that realistically address major cyclic (i.e., predictable) maintenance needs. Capital campaigns should include endowment allowances that will provide for ongoing preservation long after the current round of restoration work is complete. Boards and staffs should adopt a philosophy of prudence: “If we cannot realistically fund it, let’s not acquire it.”

None of this is rocket science, and none of these ideas are new. The concept is as venerable as the etymology of the Old English term *steward*, which means “keeper of the hall.” It is grounded in an honest and comprehensive understanding of the physical needs of the historic place and a disciplined approach to caring for it that includes raising and endowing the substantial funds required for ongoing preservation work. This honesty and discipline can present a sobering, sometimes deflating burden for the staffs, boards, and funders alike. Like a salutary bucket of cold water in the face, it says that the ordinary preservation needs of the historic place are at least as important as the exciting opportunities of new programs and staff operations. It says that if we ignore or defer these physical needs, they will accumulate, eventually overwhelming and undercutting our core purposes and missions, and destroying the sustainability of our institutions. It reminds historic sites and museums to balance program and audience development with serious attention to their historic infrastructures. And it reminds donors and grant-makers not to overlook fundamental needs in the excitement of encouraging innovation.

Fortunately, the business of historic sites and museums does not operate according to zero-sum rules. Stewardship and innovation are not opposites, and the attention to preservation needs does not need to be at odds with program development. Without stewardship, innovative programming is just a flash in the pan. Without innovation, stewardship becomes care of an increasingly irrelevant place. But tied together in a mutually reinforcing system, innovative programming and preservation stewardship can become a formula for sustainability, which in the end should be the most fundable fundamental of all.

David A. Donath is the president of The Woodstock Foundation in Woodstock, Vt.

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<sup>1</sup> National Parks Conservation Association, “The Burgeoning Backlog: A Report on the Maintenance Backlog in America’s National Parks” (May 2004). Heritage Preservation, Inc., *A Public Trust at Risk: The Heritage Health Index Report on the State of America’s Collections* (Washington, 2005).

# CULTURAL HERITAGE TOURISM TRENDS AFFECTING HISTORIC SITES

By Amy Webb and Carolyn Brackett

*A baby boomer couple decides to take a getaway trip to experience some of America's heritage in a quaint small town. They begin by checking into a restored early-20th-century bed and breakfast. After chatting with the owners about the building's history and the owners' restoration efforts, they venture downtown to an old warehouse that has been converted into a restaurant serving locally grown foods and featuring traditional live bluegrass music. The next day, they enjoy a guided neighborhood walking tour by interpreters portraying historical characters. After the tour, they drive through the countryside to view the scenery and to shop at local artists' studios for mementos of their visit.*

This couple has enjoyed what the travel industry defines as a “cultural heritage travel experience” — without ever visiting a traditional historic site museum. While not too long ago a preserved “historic site” almost always meant “museum,” the field of preservation has broadened to address a range of historic sites that are still in use for their original purpose as well as historic sites adaptively used to meet today's needs.

## GROWING INTEREST IN CULTURAL HERITAGE TOURISM

Numerous studies show that interest in cultural heritage travel experiences is increasing. A national study of cultural heritage travelers completed in 1998 and updated in 2001 showed that interest in cultural heritage tourism grew 13 percent, more than twice the increase of tourism in the United States overall. More than 43 percent of all U.S. travelers included a visit to a heritage site, battlefield, or historic community (Travel Industry Association of America: *Historic/Cultural Traveler* 2002). A 2007 survey indicates these numbers continue to grow: 51.1 percent of respondents said they visited a historic place in the past year (Destination Analysts, Inc.: *The State of the American Traveler*, January 2007).

## THE CONUNDRUM

While interest in cultural heritage travel is reaching new heights, many historic site museum managers report that visitation at the sites they operate is either flat or declining. This apparent contradiction raises a number of questions. If cultural heritage tourism is truly on the rise, shouldn't historic site museums be seeing more visitors? Are the national studies on cultural heritage tourism flawed? Is cultural heritage tourism an outmoded idea? Are historic sites somehow failing to capture the interest of cultural heritage travelers?

## WHO ARE CULTURAL HERITAGE TRAVELERS AND WHAT DO THEY WANT?

A good place to begin is by understanding who cultural heritage travelers are and what they are looking for in their travel experiences. The Travel Industry Association's *2002 Historic/Cultural Traveler Report* shows that 4 in 10 cultural heritage travelers are from baby boomer households (44–62 years old). A 2006 survey of visitors to historic house museums found a similar profile; 36 percent of those saying they planned to visit a historic house museum were between the ages of 55 and 64 (Synovate Travel and Leisure/DataPath Systems weekly travel survey).

By 2020 more than one-third of Americans will be over age 50. Because baby boomers

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Because baby boomers generate more travel than any other age group and intend to continue this active lifestyle as they retire, they are already creating new demands on the travel industry, such as for experience-based travel and accessibility for those with limited mobility.

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generate more travel than any other age group and intend to continue this active lifestyle as they retire, they are already creating new demands on the travel industry, such as for experience-based travel and accessibility for those with limited mobility. Baby boomers are redefining leisure travel by seeking out high-quality, authentic, and inter-

active experiences. This comes as no surprise to the travel industry. A 1998 National Tour Association study accurately predicted this trend, stating “because boomers are more experienced travelers, they will expect more from their experiences, and terms such as cultural tourism, heritage tourism, sports tourism, active tourism, adventure travel, and ecotourism will be commonly used within the next decade.”

## HISTORIC SITE MUSEUMS FACE UNIQUE TOURISM CHALLENGES

With studies consistently showing that cultural heritage travel is thriving and with communities across the country actively developing heritage tourism programs, the decline in historic site museum visitation needs careful analysis to understand the dilemma — and to identify opportunities to reverse this trend. These are some factors to consider:

### There are a growing number of historic site museums in America.

The number of historic site museums continues to grow without a strategic rethinking of the collection as a whole. In some cases, this has meant having several historic house museums in close proximity that offer essentially duplicate experiences. In other cases, new historic site museums are opening that represent America's changing demographics or a broader story of everyday life, yet we still hold on to older sites that are significant to a shrinking demographic. However, the idea of closing a historic site museum or converting it to another use has until recently been considered a failure.

### “Historic site” is no longer synonymous with “museum.”

In the early days of preservation, referring



to a “historic site” inevitably meant a historic site museum. Indeed, what might be called the beginning of heritage tourism was the preservation of George Washington’s Mount Vernon in 1859 and Andrew Jackson’s Hermitage in 1889. These sites and others were saved to make them available for visitors to tour.

Today, while historic site museums remain a significant part of the preservation movement, the concept of preservation has expanded to encompass a broader spectrum of America’s historic fabric. As in the case of the baby boomer couple’s weekend trip, the result is a heritage tourism experience that features a packed itinerary without including a traditional historic house museum. History may be conveyed through a brochure placed in a B&B guest room, in a narrative on the restaurant menu, on interpretive signage downtown, or with audio tours. Thus historic site museums may also compete against other historic sites — some of which may offer visitors a more engaging or unique experience.

### **Historic site museum tours don’t always fit into hectic schedules.**

Research clearly reflects changing travel patterns — more than 50 percent of travel is on the weekend, and 55 percent of travelers plan their trip one month or less in advance. In addition, 26 percent of tourists make decisions about museum tours after arriving at a destination. Tourists also may want to fit many different activities into their trip, including shopping, recreational activities, or visiting friends and family.

For many historic site museums, limited hours, days, and months of operation are the norm. The result is that visitors who

may want to tour a historic site museum may not be able to simply because it is not open when they are available. At the same time, other attractions — such as zoos or theme parks — usually offer regular hours and days of operation and are able to accommodate tourists’ schedules.



Founded in 1996, Classics at Bruce more annually attracts thousands of patrons from around Eastern Iowa and beyond. Held outdoors, it’s an example of programming that makes use of more than just the historic building and attracts different audiences besides the usual historic house visitor. Photo by Greg Billman, courtesy of Bruce more.

### **Partnerships with the travel industry may not have been established.**

The travel industry is fast paced and frequently requires an investment of time and funds that many historic site museums do not have. Often the responsibility for marketing falls to the executive director or a volunteer committee with little tourism

experience and minimal funds to direct toward marketing. Promotions are frequently limited to printing a brochure or purchasing an occasional advertisement instead of developing a marketing plan and establishing partnerships with the tourism bureau and other attractions. Historic site museum managers must also decide where to direct limited resources as they try to attract and serve not only tourists but also local residents, schoolchildren, and members.

### HOW CAN HISTORIC SITE MUSEUMS BENEFIT FROM CULTURAL HERITAGE TRAVEL?

Although these challenges might create a bleak picture, historic site museums can benefit from the growth of cultural heritage travel with new strategies that respond to the changing needs of today's travelers. Many historic site museum staff and volunteers are taking steps to attract more visitors and to position sites as a key component of a destination. Successful strategies shared by many historic site museums include:

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While collections are indisputably important, it is time for the pendulum to swing toward a stronger focus on the visitor experience.

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#### Design tours that will engage today's visitors.

In finding the balance between caring for collections and providing meaningful and interactive visitor experiences, historic site museums have tended to emphasize

collections care. While collections are indisputably important, it is time for the pendulum to swing toward a stronger focus on the visitor experience. The authors of *Great Tours! Thematic Tours and Guide Training for Historic Sites*<sup>1</sup> identify two key questions: "What does our site illustrate best about the past?" and "How can we use our resources to amplify and communicate our site's historical messages?" The authors note that understanding a historic site's story and making the best use of all its resources including buildings, landscape, collections — and people — are the "essential foundation for creating informative, memorable guided tours at historic sites."

For example, at the Lower East Side Tenement Museum in Manhattan, a range of guided tours focus on the stories of real immigrant families, and tour guides connect those past experiences to immigration experiences amongst the present-day tour-goers. Kate Stober, public relations coordinator for the tenement museum, explains that the museum is "one of the only places in the world that tells the story of the laboring class, of poor immigrants and migrants." This unique experience conveys a sense of the challenging conditions that many immigrants faced upon arrival in America and speaks to a broad segment of America's changing population. This may help to explain why the museum has seen annual attendance figures steadily increasing from 16,000 in 1994 when guided tours were first offered to 128,513 in 2007. Attendance has grown every year except for the year around 9/11 when visitation remained at the same level as the previous year.

### **Offer unique and innovative special programs.**

In addition to offering tours, consider ways to use the site creatively during hours or days when regular tours are not given. Creating unique programs and activities can attract targeted niche audiences of both tourists and local residents. Opportunities can range from programs with knowledgeable speakers to behind-the-scenes tours, hands-on activities, or even classes. Because these programs are usually limited to a small group and they require special planning, they can also command an admission price that not only covers the cost of producing the program but provides a profit. For example, the Frank Lloyd Wright Preservation Trust offers a quarterly evening workshop series called the “Architecture Fantasy Camp” at the Frank Lloyd Wright Home and Studio in Oak Park, Ill., that allows non-architect participants to work on a design project in Wright’s architectural studio under the direction of trained architects.

### **Recruit more involvement by the local community.**

Forty-three percent of people who volunteer say they became involved because they were asked by someone in the organization (U.S. Department of Labor, Bureau of Labor Statistics, September 2004-2005). Historic site museums often look to community leaders to serve on boards or to head fundraising campaigns. But there are many opportunities to involve local residents that will fulfill their enjoyment of volunteer service and benefit the historic site.

Consider ways that local volunteers can be involved in developing programs or tours or help with tasks ranging from landscaping to hosting events. Recruit volunteers by becoming visible in the community — speak to



The Lower East Side Tenement Museum in New York City offers a variety of different programs to attract both visitors and local residents. Photo courtesy of the Lower East Side Tenement Museum.

civic and school groups, place notices in the local newspaper, confer with other historic sites about possibly sharing volunteers, and work with community volunteer placement organizations.

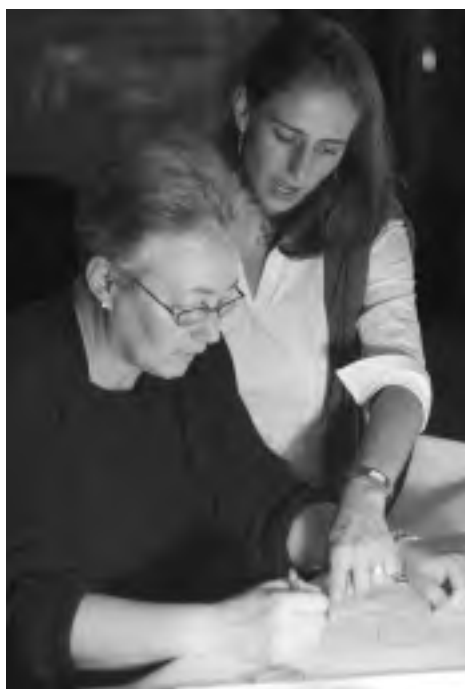
### **Don't rely only on a tourism audience or only on a local community audience.**

The most successful historic site museums appeal to diverse audiences of both out-of-town visitors and residents. Diversifying has the dual advantage of expanding market potential and at the same time buffering historic sites in the event of a downturn in any one target market. For example, the historic Hardesty-Higgins House in Harrisonburg, Va., has been renovated as a multi-use facility and provides a combination of offerings

including a visitors center, tea house/restaurant, and the Valley Turnpike Museum, appealing to both locals and visitors.

### Take advantage of tourism marketing venues.

There are many ways that historic site museums can work with local and state tourism bureaus to promote their sites at little or no cost. Cost-effective opportunities can include keeping event and tour announcements up-to-date on tourism websites; participating in familiarization tours for travel writers or tour operators; providing free admission to tourism bureau



Unique programs such as behind-the-scene tours or classes can help tourists and local residents become more deeply involved with a site. At the Frank Lloyd Wright Home and Studio in Oak Park, Ill., an architecture Fantasy Camp participant and architect work on house design. Photo courtesy of Frank Lloyd Wright Preservation Trust.

and frontline travel industry staff; hosting local tourism industry meetings at the site; and participating in cooperative advertising purchases. In addition, all historic site museums should maintain a website that is kept current and linked to other attractions as well as tourism bureaus. Placing information on the website in a downloadable format can keep down the costs of printing and distributing brochures.

### Don't get stuck in the status quo; be open to and embrace change.

The best approach for a historic site in 1968 or 1988 may not be the best approach in 2008. If it is not possible to adapt to meet today's needs, it may be necessary to make the difficult decision to transition to a new use. In some cases, allowing one museum to go away may make room for a new historic site museum that reflects the stories of greatest relevance to today's changing American population. For those historic sites that have reached the end of their viable lifespan as museums, responsible stewards will need to guide the site through a transition to an appropriate alternative use. This is a natural evolutionary process that will ensure the sustainability of the most important item in the museum's collection — the historic site itself.

## HISTORIC SITE MUSEUMS AT A CROSSROADS

In analyzing the trends at historic site museums, it is important to consider changes to the demand as well as the supply side of the equation. While there are more cultural heritage travelers now than perhaps ever before, traditional historic site museums don't necessarily always offer what today's travelers are looking for. The bar has been raised, and historic site museums that do not

adapt will continue to experience declining visitation. Competition is increasing, not only from new historic site museums but also from other heritage and non-heritage attractions and experiences that are vying for visitors' time.

For some historic site museums, shifting the primary focus to the visitor experience will draw sufficient visitation to justify existence as a museum. Other historic site museums may need to reevaluate their core mission. It may not be possible to support an ever-expanding number of historic site museums, the majority of which require underwriting from governmental or private sources. If there are other historic site museums that provide similar experiences nearby, or if the museum's focus is less relevant to audiences today, it may be time to reconsider the site's function.

If in the coming years we create innovative visitor experiences at our historic site museums, we will see these sites benefit from the growth of cultural heritage travel as they become part of well-preserved historic communities that offer a variety of engaging opportunities to learn valuable lessons about our heritage.

[Amy Webb is the director of the National Trust's Heritage Tourism program. Carolyn Brackett is the senior program associate for the program.](#)

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<sup>1</sup> Barbara Abramoff Levy, Sandra MacKenzie Lloyd, and Susan Porter Schreiber (Alta Mira Press, American Association for State and Local History, National Trust for Historic Preservation, 2001).

# THE IMPACT OF STANDARDS ON THE SUSTAINABILITY OF HISTORIC SITES

By Katherine Kane

At the Kykuit conference on Historic Site Stewardship in the 21st Century in April 2007, attendees discussed the standards and best practices affecting historic sites and the impact of those standards and best practices on sustainability. By reviewing and summarizing those discussions, I hope to prompt further thought and public dialogue on the issues and on what I think are necessary changes in attitude and action.

It is clear that the museum field is in the midst of evaluating and revising standards. Formal accreditation programs exist at the American Association of Museums, zoos, gardens, and art museums, or are being developed. Though standards programs have long been in place, public perception of museums has been affected by the fallout from misdeeds, accidental and purposeful, in both nonprofits and for-profits. In the U.S., museums are nonprofits, responsible to the public trust. Lapses of that trust have brought heightened government scrutiny and new legal oversight.

There is also clearly a gap between what the standards actually are and what some museum professionals believe they are — leading to unnecessary rigidity or other negative effects. These are some of the issues this article highlights.

## STANDARDS AND BEST PRACTICES THAT AFFECT HISTORIC SITES

Two well-known organizations offer standards programs for historic sites: the Ameri-

can Association of Museums (AAM) and the American Association for State and Local History (AASLH). Historic sites are also expected to meet the requirements of multiple other programs. Some examples are the National Park Service, the Secretary of the Interior's Standards, and, perhaps most important or influential, collection management standards established by the American Institute for Conservation of Historic and Artistic Works (AIC).

## AAM STANDARDS

AAM's standards and best practices have been approved by the AAM board of directors after being developed by the Accreditation Program and the AAM board's Ethics Committee with extensive input from the field. They apply to all museums, whether or not they are AAM members, or whether or not they are accredited. Given the many types of museums (zoos; botanic gardens; children's museums; history, science, and art museums; and historic sites) the accreditation standards are necessarily broad in scope.

The AAM Accreditation Program is now almost 40 years old. The number of museums has grown explosively since the program was developed in the early 1970s; in recent years the Institute of Museum and Library Services (IMLS) estimated there are 18,000 museums. The accreditation program's systematic effort to describe museum standards and provide a method to review and measure individual museum

performance against the standards has helped raise the professionalism of the entire museum field.

Accreditation is based on two core questions: How well does the museum achieve its mission? and Does the museum meet standards and best practices as they are generally understood and as appropriate to its circumstances? The “characteristics of an accreditable museum” are described in AAM handbooks and on the website [www.aam-us.org](http://www.aam-us.org). The characteristics fall into seven broad categories:

- public trust and accountability,
- mission and planning,
- leadership and organizational structure,
- collections stewardship,
- education and interpretation,
- financial stability,
- facilities and risk management.

Because standards change over time, describing and reaching them is a moving target. Thus, an accredited museum undergoes a subsequent review every 10 years. Some museums are going through their third or fourth accreditation review. The other critical element is peer review. A museum undergoing accreditation review or participating in AAM’s Museum Assessment Program (MAP) benefits from an on-site visit by peer professionals.

Of the estimated 18,000 museums, 800 are accredited at any one time. Out of these accredited museums, 33 percent are history museums and historic sites. Though history museums and historic sites are the most

numerous museums, they are under-represented in the program.

The accreditation program has been conducting sessions around the country for input from the field and is piloting a shortened subsequent review process. Preliminary feedback shows that for the program to grow significantly it would need to be less labor intensive for museum participants.

## AASLH HISTORY STANDARDS PROJECT

In the AAM Accreditation Program, some areas important for history museums are secondary or not included, such as library/archives or historic buildings. During the first Kykuit conference in 2002 on historic houses, participants discussed the types of standards needed for small and mid-sized history museums and the desire for a tailored standards program that could be completed in phases and that includes archives and special collections, historic landscapes, and buildings. In response, AASLH is conducting a pilot project to develop a standards program and a framework of assistance, funded by IMLS. The project is being closely coordinated with AAM Accreditation and Museum Assessment programs, and builds on the framework of AAM standards, adding specifics as needed to address issues particular to history museums and historic houses/sites. Volunteer teams across the country have drafted a self-assessment tool which is being reviewed this spring and will be piloted in 2008 and implemented in 2009. It will be an incremental program, by which a museum can work to meet standards one area at a time.

The pilot project has the following objectives:

- Provide museums and historical organizations with standards and resources for a step-by-step approach for improvement.
- Build a program that encourages improvement and rewards progress.
- Allow institutional participants to work toward excellence one operational area at a time.
- Complement rather than compete with guidelines and/or standards issued by other associations and/or agencies within the museum community including AAM's Accreditation and Museum Assessment programs.
- Invite state, regional, and national service providers to help deliver program services to their constituents. (Service providers are groups like regional and state museum associations and state historical society field service offices organized to deliver training programs to museums.)

A museum will be able to work on this self-assessment section by section, building accomplishment and capacity and getting recognition for progress.

## ADDITIONAL STANDARDS

Successful history museums and sites also implement standards from outside the museum world. Kykuit attendees mentioned several of these such as standards of the National Park Service, the Secretary of the Interior's Standards, the Association of Art Museum Directors, and the American Institute for Conservation.

Funders apply their own filters in making decisions; these filters, then, effectively

function as standards. During this Kykuit conference, attendees — including representatives from the funding community — listed some of the filters that influence funding decisions: impact numbers (on- and off-site attendance, web hits); management capacity and staff levels; capacity to raise matching money; overall fundraising capacity; the funder's interest areas; the museum's partners; impact by location, mission, and partner; regulations (when government or law set the standards); geographic diversity; and public access. Museums think funders want innovation (i.e., new), though the funders at the meeting said they want "good" more than "new."

Awards programs also apply evaluative criteria. In the AASLH awards program, for example, the core question is "Is it good history?"

## WHY STANDARDS ARE NEEDED

Conference participants agreed that standards help museums survive, because they:

- Encourage improvement.
- Protect collections from inappropriate treatment.
- Give the public, media, donors, and grantors a way to identify places that are doing things according current professional standards.
- Present benchmarks and external measures of performance for the museum and the public.



## THE NEED TO CORRECT MISPERCEPTIONS ABOUT STANDARDS

Kykuit discussants thought that standards can hinder museum sustainability. It was here that the gap between actual standards and perceptions of them was most obvious.

Perceptions of standards are affected by overlapping professions (historians and conservators, for example) and reflect attitudes that change more slowly than standards. For example, it was once acceptable to loan collection items to trustees for their homes or routinely use costume collections in fashion shows. And commonly held beliefs — such as HVAC must be installed in historic houses to protect the collections, that you can't let people touch objects, that all objects are of equal value — are in fact the perceptions of the field, rather than an accurate reflection of the actual standards.

Such misperceptions can have detrimental effects:

- Professional staff can reinforce the rigidity of standards to the detriment of mission-based program delivery. A focus on collections care can inhibit interactive opportunities for the visitor experience.
- Some standards that protect collections can damage historic sites. For example, installing climate control systems might compromise historic fabric of a building.
- Perceptions of standards affect cost of implementation: The perception that standards dictate that every object is as “precious” as another affects reasonably prioritizing care.
- “Do not touch” environments inhibit

creativity, learning, and innovation — by the institutions and by the public. Reproductions are one option to allow visitor use without endangering original artifacts, yet the high cost of quality reproductions can make this prohibitive. And using tactile learning also necessitates teaching visitors why some artifacts may be touched but not others.

## CURRENT THINKING AND CHALLENGES

For sustainability and survival of museums, it could be argued that the most important standards are the public's standards. Historic sites and museums need to meet audience needs, and visitors and users have different standards than the profession. They want convenience, entertainment, and social learning experiences. They want things to do and touch. They want materials to take away. They want to be stimulated and even provoked. They want the sites to be physically and intellectually accessible. Successful visiting experiences change the visitor's perspective and attitude; such experiences lead to a healthy human spirit. Relevance to the audience is the fundamental standard.

### Observations

The discussion of standards at Kykuit was lively and elicited the following ideas and observations relevant for the whole field of historic sites:

“Muse” in museum means poetry and inspiration yet the word “museum” can be a slur, representing stodgy, hands-off, static, or elitist. Standards don't help to reach the soul of the visitor (and bring an affective response); the highest level experience effects experiential change.

Collections are a means, a tool — not the core of the institution, which is its mission. The mission is the nexus of place, audience, and experience.

Each activity and program a museum undertakes should have multiple benefits rather than being one-off's. How can we be clearer about the multiple benefits from standards programs? From all we do?

Discussants agreed that museums have become too rigid in site use; historic sites are not just about history, rather they should educate and inspire.

The question of whether historic sites and museums are in crisis was intensely argued. Some believe museums are struggling with finances and audience connection. Others pointed out that an aging population means boards, volunteers, and staffs are older and there may not be replacements when they leave their positions. And, if your museum is on life support, it's too late to do standards.

### Challenges

As a field, historic sites don't keep track of innovations very well. The result is that successes — as well as lessons learned — aren't widely shared to motivate and guide others. There is no formal or informal database of such information.

Potential upcoming changes in public policy will affect areas we care about. The structure of the federal No Child Left Behind Law, enacted in 2002 and now up for renewal, leaves history and social studies out of the mix and is deeply affecting the future of the history audience — now and as those schoolchildren age, creating a generation without an affinity or even a basic knowledge of history.

Kykuit participants considered why museums don't partner and collaborate more than they do and observed that beyond competing for dollars and leadership, museums can be insular and protective; sharing isn't part of the culture. This can affect audience interactions, reputation, and community involvement.

### CALL TO ACTION AND SOLUTIONS

The discussions at Kykuit generated some of the following recommendations:

- Historic sites need to break out of the “museum” box and assert that they are a “different species” (as zoos and botanical gardens have done).
- We should create “situational standards” rather than one-size-fits-all standards to find an acceptable balance between responsible stewardship of collections and providing a meaningful visitor experience. Or, as some of the discussants said, we need “guidelines” not “standards,” and “tools” not “rules.”
- Sites should promote history as a core American value and standards should help.
- Standards programs should deliver measurable value and impact.
- Sites should accept less rigid, more flexible site use.
- There should be more discussion and decisions about when and how it is acceptable to adapt collections standards so that each site can provide a better visitor experience. The balance should shift from preserving collections to a focus on people.

- We should distribute examples and case studies so sites can test “situational standards.” These should be direct, public sharing of success stories and lessons learned. These examples and case studies should feed into the standards for historic sites being developed by AASLH. We need articles that discuss deviating from the traditional model with balanced conversation about what’s not okay.
- Colleague consultations and advisory support can help staff think differently and validate decisions that stray from traditional museum standards.
- Designate “tiers” of value for collection items. Identify, for example, what is irreplaceable and what is still available or replaceable. Many museums have “permanent collection” and “use collection” designations and the latter includes items that have been identified as being acceptable to use rather than just display.
- Educate boards and staffs of historic sites to be more open to new possibilities. Rethink professional training to include more discussion of flexible standards and fight the specialized museum staff’s “tunnel vision” so that everyone has a sense of responsibility for the entire organization. Involve universities in implementing changes to museum studies.
- Be open to alternative uses for historic sites beyond museums.
- Broaden the definition of museum to be a community resource with community involvement and engagement.

Katherine Kane is the executive director of the Harriet Beecher Stowe Center.

## THE AAM ACCREDITATION PROGRAM PRESENTS:

### The Characteristics of an Accreditable Museum... in Plain English

This “translation” of the Characteristics of an Accreditable Museum from program-speak into “plain English” is intended as a lighthearted way to demystify Accreditation Program standards by showing that they are not “extra work” or unattainable, but all things that any well-run museum and nonprofit should be doing anyway. Please visit [www.aam-us.org/accred](http://www.aam-us.org/accred) for the official version of the Characteristics and to learn more about accreditation standards. **Reprinted with permission from the American Association of Museums.**

### Public Trust & Accountability

#### Accountability

- Be good
- No really — not only be legal, but be ethical
- Show everyone how good and ethical you are (don’t wait for them to ask)

#### Community engagement

- Do good for people
- Know which people
- And to be on the safe side
  - Be nice to everyone else, too
  - Especially if they live next door

#### Diversity and Inclusiveness

- Avoid cloning
- Look something like the people you are doing good for
- And maybe a bit like your neighbors
- Let other people help decide what games to play
- And what the rules are
- Share your toys

## Mission and Planning

### Mission

- Know what you want to do
- And why it makes a difference to anyone
- Then put it in writing
- Stick to it

### Planning

- Decide what you want to do next
- When you are deciding what to do, ask lots of people for their opinion
- Put it in writing
- Then do it
- If it didn't work, don't do it again
- If it did work, do

## Leadership and Organizational Structure

- Make sure everyone is clear about who is doing what
  - The board knows it is governing
  - The director knows she is directing (and the board knows it too)
  - The staff know they are doing everything else
- And have it in writing

## Collections Stewardship

- Know what stuff you have
- Know what stuff you need
- Know where it is
- Take good care of it
- Make sure someone gets some good out of it
  - Especially people you care about
  - And your neighbors

## Education and Interpretation

- Know who you are talking to
- Ask them what they want to know
- Know what you want to say
  - (and what you are talking about)
- Use appropriate language (or images, or music)

- Make sure people understood you
- And ask them if they liked it
- If not, change it

## Financial Stability

- Put your money where your mission is
- Is it enough money?
- Will it be there next year, too?
- Know when you will need more \$
- Know where you are going to get it from
- Don't diddle the books

## Facilities and Risk Management

- Don't crowd people
- Or things
- Make it safe to visit your museum
- Or work there
- Keep it clean
- Keep the toilet paper stocked
- And if all else fails, know where the exit is
  - (and make sure it is clearly marked)

# A GOLDEN AGE FOR HISTORIC PROPERTIES

By John Durel and Anita Nowery Durel

Historic properties are on the verge of a golden age. Over the next two decades Americans will turn to historic houses and sites as a source of learning, enjoyment, and fulfillment. Increasingly, people will choose to spend time in places that connect them to their past, to nature, and to beauty. In return, they will provide financial support to help sustain the properties.

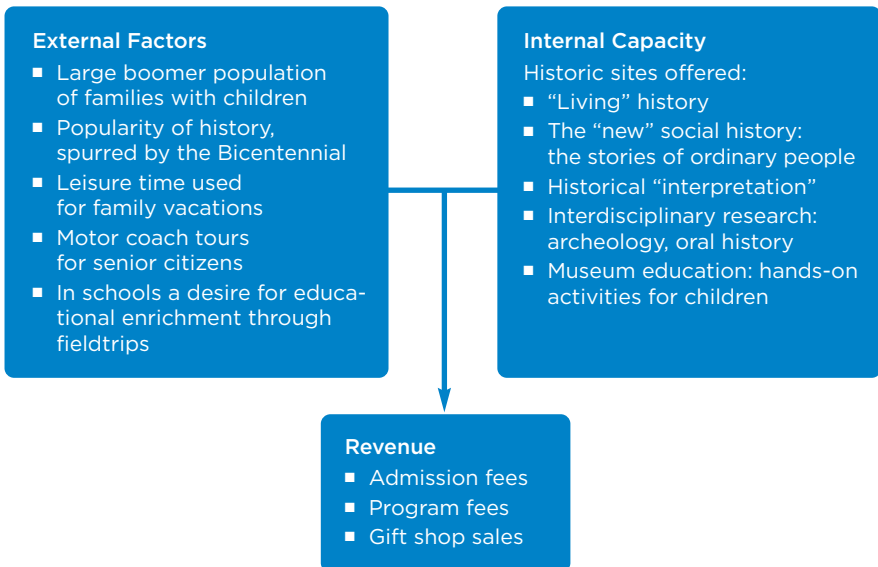
This future will occur only for organizations that abandon the thinking of the 1980s. Specifically, the leaders of historic properties that enter the golden age will:

- Focus on members and affinity groups, not visitors.

- Emphasize the spiritual as well as the intellectual and social dimensions of the site.
- Have an effective individual giving program in place.

## CULTURAL TOURISM

Since the 1970s the dominant business model for historic properties has been cultural tourism, in which the organization provides an experience for a visiting public in exchange for admission fees and museum shop sales. The model became dominant at a time when nonprofits were expected to be run like businesses, with “customers” paying for services received. This diagram depicts the model.



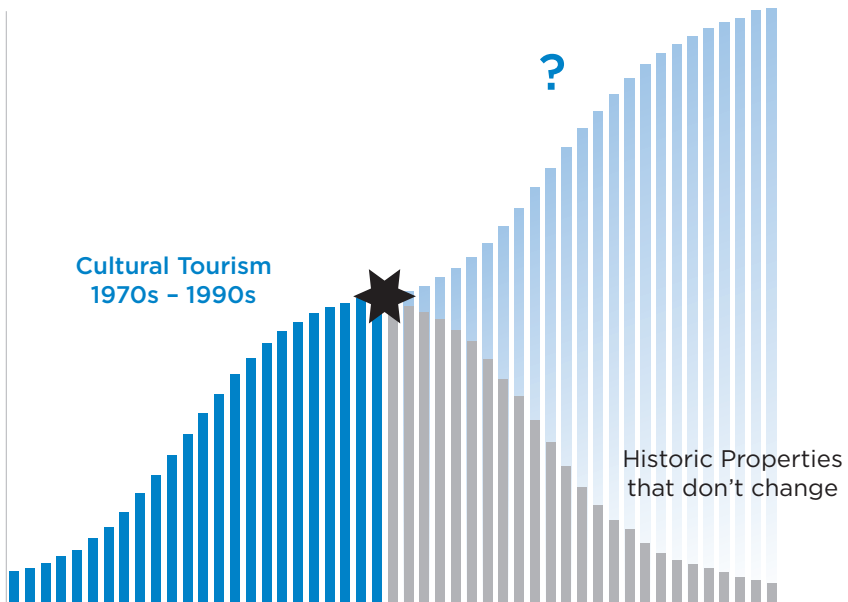
Colonial Williamsburg has been the granddaddy of the cultural tourism model. Remember those 1-800-HISTORY commercials with the happy families walking along Duke of Gloucester Street. Now there are far fewer families. Visitation has dropped from 1.1 million in 1985 to 710,000 in 2005, “despite two decades of investing millions of dollars to try to make the museum relevant to a younger, more diverse group of tourists.”<sup>1</sup> This decline in tourism is widespread, with many other historic sites reporting comparable figures.

What has changed? American families still take vacations, but the competition is stiff. Cultural sites must compete with Disney World, Las Vegas, Europe, and other vacation destinations. Additionally, the lack of transportation funding for school

fieldtrips is a chronic issue, and senior citizens now appear to be taking their bus trips mainly to casinos.

In reality, the model never worked completely. Most historical organizations have supplemented earned revenue with fundraising, usually in the form of grant writing and fundraising events. The problem has been that we have focused most of our attention on the cultural tourist, an audience now in decline. Renewed efforts to attract them with novel programs or better marketing may succeed briefly, but ultimately will fail. Unless something changes dramatically we will see more historic properties close.

The question is: What is the new business model to replace cultural tourism? We have entered a period of uncertainty as we try



to figure out what will work next. It is a time to experiment, learn from mistakes, recover quickly, and build on successes. With strategic thinking and discipline an organization should be able to make the transition successfully.<sup>2</sup>

## BOOMERS WITH TIME AND MONEY

We have a friend who has just retired from a career as a clinical psychologist. In retirement he plans to get more involved with music. Over the years he has been an audiophile, acquiring instruments and equipment, and playing occasionally with friends. Now he will have a studio in his house and play regular gigs at clubs in town. He will spend lots of money and time on this pursuit. It will give him great satisfaction.

Another friend, a retired manager from Shell Oil Company, has had a lifelong interest in World War II, stemming from stories he heard from his father. Now he spends his days at the library researching particular army units or military engagements, and presents what he learns to a “roundtable” of others who share his interests. He travels and is a member of several museums that have WWII collections. Through oral histories he is preserving the stories of veterans in his community. He sees this as both his passion and his responsibility.

As boomers enter retirement, with time and money to spend, historic properties have a remarkable opportunity. A site can become both the venue and the organization through which like-minded individuals pursue their common interests. Many retirement activities will involve nature and being outdoors; many historic properties have

land, gardens, and trails to serve these purposes. Many retirees will want to deepen their knowledge or perfect a skill; many sites have collections, libraries, work spaces, equipment, and expertise to enable them to do so.

## SMALL AFFINITY GROUPS

When people no longer have a workplace to go to every day, they seek camaraderie elsewhere. The need to associate with others is basic to human nature. McDonald’s restaurants have long tapped into this need. From an obituary in the *Charlestown Daily Mail*, in West Virginia: “He was a member of the Judson Baptist Church and McDonald’s Breakfast Club and was an Army veteran of World War II.”<sup>3</sup>

There is likely to be a surge in small affinity groups as boomers retire. Most won’t be hanging out at McDonald’s. They will join existing groups or form new ones centered on their interests. They will plan their own programs, trips, events, and gatherings. Historical organizations can potentially provide venues, resources, and overarching structures for these groups. Small affinity groups could become the primary audience for historic properties in a new model.

Each affinity group would be relatively small, to build strong interpersonal relationships. There could be a gardeners’ guild, a history study group, a collectors’ club, a cooking group, a music group, an astronomy group, a travel group, a hiking group — whatever any group of individuals might want that makes legitimate use of the organization’s resources. Each affinity group would plan and implement its own programs and activities, for its own members, as well as for others. Each of the groups would be a subset of the general



Nelly's Needlers, a group of volunteers at Woodlawn, have organized a popular juried exhibition of contemporary needlework since 1975 to both promote this craft and support the site. These types of affinity groups can replace tourists as a primary audience but it requires a fundamental shift in the way historic sites operate. Photo by Max A. van Balgooy.

membership. Through dues the group would support the whole organization.

In this approach it will be necessary to counter a tendency for small groups to become insular. Everyone should be welcome to join a group. The determinant should be interest, not wealth, age, or social standing. Indeed, this approach offers an opportunity for learning across generations and cultures. One can envision a collectors' group where young and old of different backgrounds sit together to compare what they have and share what they know.

## THE FUTURE STAFF

Retirees already volunteer at historic sites, helping to weed gardens, give tours, or care for collections. They are seen as extra help for the staff, whose primary concern is to

serve the public. In the future, retirees may be both *staff* and the *primary audience*.

The *New York Times* reports that "with the bulging post-war generation nearing its retirement years, statisticians forecast a growing gap of unfilled executive and managerial jobs."<sup>4</sup> As boomers retire from historic sites, their jobs may be filled by volunteers, or they may continue on in a part-time capacity. In any event, the number of full-time paid staff probably will shrink.<sup>5</sup>

With fewer staff, the organization could use affinity groups to fill the gap. For example, a single paid staff person might work with the history study group and the exhibits group to produce exhibits; with the gardeners and the nature club to care for the grounds; and with the drama society and the



musicians to create performances for the community. To do this job effectively, this staff person would need the ability to sustain strong relationships and coordinate the work of others. Indeed, this is the way many small historical organizations already work.

Ebay offers a model for this kind of organization. The internet-based marketplace does not actually buy and sell anything. Rather it provides a structure so that anyone can buy and sell. In this sense, historical organizations would not have to plan and implement activities. They simply would provide a structure so that members could do things for themselves.

Systems that distribute both the work and authority to make decisions function effectively only if everyone shares certain values and if there are mechanisms for resolving disputes. This model might work for historic properties if all affinity groups and individuals share a strong preservation ethic and recognize the ultimate authority of the organization's governing board.<sup>6</sup>

## LESSONS FROM PHILANTHROPY

Many successful businesses remain small, foregoing growth in favor of intimacy. They prefer loyal customers whom they see often, rather than many more customers whom they see infrequently. Historic sites have pursued growth, often at the expense of intimacy. We seek large numbers of visitors who come once, rather than focusing on a smaller number of members who participate regularly.<sup>7</sup>

In the long run an investment in membership will have a greater payoff than a comparable investment in cultural tourism. Members

active in affinity groups will become committed not only to the organization but also to their friends, and in time many will become donors. This is the heart of philanthropy: people giving to people. Donors give to organizations that mean something to them, and where they have close relationships.

The vast majority of giving in the U.S. — more than 83 percent each year — comes from individuals.<sup>8</sup> These donors give primarily to churches, schools, and hospitals. Such organizations recognize the importance of personal relationships — with a minister, a doctor, a teacher, or former classmates — and sustain those relationships through frequent communication and involvement.

A recent trend in philanthropy is the formation of giving circles composed of individuals who share a particular interest, such as children's issues or the environment. Giving circles permit people of ordinary means to have a greater charitable impact by combining money and making grants collectively. Twenty members in a circle, each contributing \$500, can provide a single grant of \$10,000 and make a genuine difference.

The tourism model does not produce the equivalent of parishioners, alumni, grateful patients, or giving circles. Fundraising for historic properties has been largely a matter of writing grant proposals and organizing events, with little attention given to cultivating individual donors, except during capital campaigns.

The lesson is clear. Several hundred loyal members active in affinity groups are far

more likely to make financial contributions than the thousands of visitors you might otherwise attract. If you want to build a strong financial base for the future, membership is a better way to go. The primary fundraising job is to cultivate these individuals and turn them into donors, just as major gift officers do at hospitals and universities.<sup>9</sup>

## THE SPIRITUAL DIMENSION OF HISTORIC PROPERTIES

Historic sites are physical places with strong spiritual qualities. In 2005 Drayton Hall received an unexpected donation, with a letter explaining that the donor had attended an evening event on the property and fondly recalled seeing the moon shining on the Ashley River. A person's most meaningful historic site experience can be a time alone, or with a small group, when one is able to really be *in* the place, *sense* its beauty, and *feel* the presence of the past.

Americans have begun to take spirituality seriously. Moving beyond the materialism that has dominated American life for the past half century, people are looking for meaning and purpose in their lives.<sup>10</sup> For many boomers, entering this next stage will be a time to reflect on what is most important. Some will have heightened interests in their roots and in history. Many will look ahead and wonder what legacy they will leave their children and grandchildren.

Historic properties, beyond being places to pursue interests and friendships, can offer boomers an opportunity to make a lasting difference. Involvement can make one's last decades of life especially rewarding, fulfilling basic human needs to honor one's ancestors and to leave something of enduring value for those who follow.

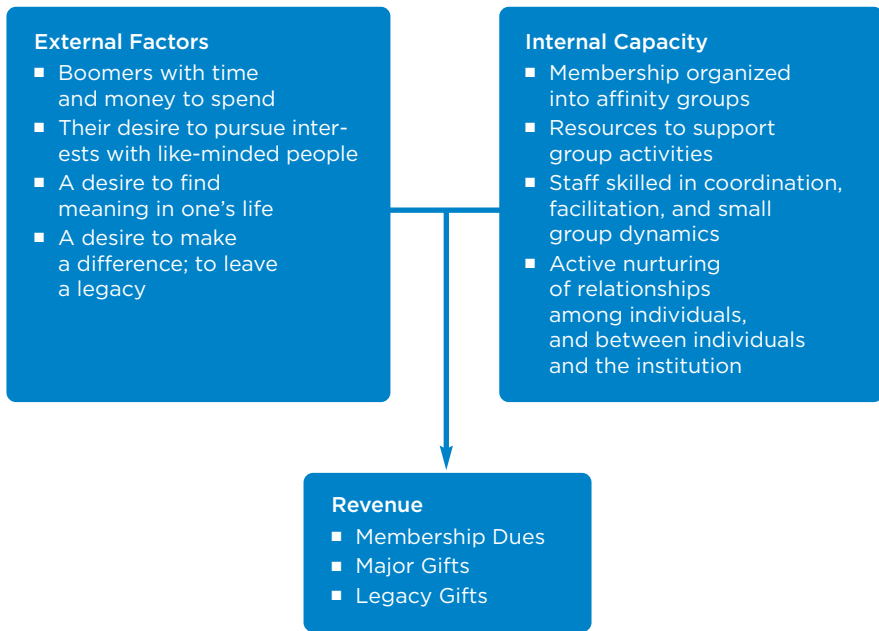
Individual bequests — a person's *ultimate* gift — accounted for 9 percent of all money donated in 2003. This is the way individuals make a final contribution to the well-being of those they love, and to the success of institutions they value. If toward the end of life an individual has a meaningful relationship with your historic site, and has made good friends there, and if you have an active planned giving program, then there is a strong probability that your institution will receive a bequest.

## A NEW BUSINESS MODEL: AFFINITY GROUPS

The following diagram combines the foregoing observations into a new business model for historic properties. Affinity groups replace tourists as the primary audience, internal capacity shifts from historical interpretation to support of group activities, and revenue comes from individual giving rather than admission fees and sales.

This new model will require a fundamental shift in the way historic properties function. Instead of creating activities for visitors, staff will provide expertise and logistical support for affinity groups. Rather than controlling the groups directly, staff will establish standards and policies, educate the groups, and empower them to act. Instead of being a leader in charge of an activity, staff will have to learn to lead indirectly through support and facilitation.

For years the staff has functioned as interpreters of the past. They do research, select artifacts, arrange rooms, and give tours. Some tours are highly engaging and informative. More often, they are simply



adequate, providing visitors with a satisfying but unremarkable experience.

The future primary audience — affinity groups — will already be knowledgeable. They will want to discover new information and share what they know. A gathering of such a group in a historic house will not be one in which an interpreter tells about the place. Rather, it will be a facilitated group discussion exploring different interpretations, encouraging new questions, and generating fresh insights.

## A CALL TO ACTION

Most historic properties operate with very tight budgets. Some have downsized and depleted reserves. In this climate, it is hard to be hopeful. Yet we, the authors, are optimistic because we understand that the current situation reflects neither the inherent value of historic sites nor the competency of those who lead them.

Now is the time to abandon the assumptions of the old model and begin to test the waters of the new. Success will not come overnight. But if changes are not initiated now, it may soon be too late. We recommend:

- Focus on members instead of visitors as the key indicator of success. Treat membership as a strategic rather than an administrative function, staffed by someone who understands the process of building relationships.
- Experiment and test ways to support and share authority with affinity groups. For example, the Brooklyn Historical Society has opened one of its galleries to community groups to produce exhibits of their own.
- With an existing group of volunteers explore a new structure, wherein they become an affinity group as a part of the membership program. Examine the pros and cons, and run a pilot program.

- Start a major gift/planned giving program to cultivate members and turn them into donors. Make this the primary role of development.
- Produce more opportunities for people to experience the spiritual dimension of your site, offering times when they can be alone or in small groups.

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Allow visitors to watch and ask questions about actual restoration work or archeological research to provide them with a more in-depth experience at a historic site. Photo by Max A. van Balgooy.

A longer version of this article appeared in the Summer 2007 issue of *History News*. For a pdf of the longer article go to [www.aaslh.org/documents/GoldenAgeHNSummer07.pdf](http://www.aaslh.org/documents/GoldenAgeHNSummer07.pdf)

<sup>1</sup>“Homes Sell, and History Goes Private,” *New York Times*, December 31, 2006.

<sup>2</sup>Will Phillips, *The “S” Curve: Causality and Viscosity — Concepts for Understanding Your Organization*, [www.qm2.org](http://www.qm2.org). Many of our thoughts about a new business model parallel those of John H. Falk and Beverly K. Sheppard in *Thriving in the Knowledge Age: New Business Models for Museums and Other Cultural Institutions* (AltaMira Press, 2006).

<sup>3</sup>Quoted in “Retirees Take It Slow Amid the Fast Food,” *Baltimore Sun*, February 7, 2007.

<sup>4</sup>*New York Times*, January 11, 2007, page A1.

<sup>5</sup>For more on these trends, see John Durel, “Museum Work Is Changing” in *History News*, Summer 2002.

<sup>6</sup>Ori Brafman and Rod A. Beckstrom describe open organizations in *The Starfish and the Spider* (Penguin Group, 2006).

<sup>7</sup>Bo Burlingham, *Small Giants: Companies That Choose to Be Great Instead of Big* (Portfolio, 2005).

<sup>8</sup>Giving USA Foundation — AAFRC Trust for Philanthropy/*Giving USA 2004*.

<sup>9</sup>We are not suggesting that individual giving will totally replace support from government, foundations, and corporations. Indeed, family and private foundations have grown significantly in the past few years. Many wealthy individuals are choosing this means to support the causes that interest them. As with individual donors, foundations and corporations have to be cultivated. The new business model can be helpful in this regard, by making it easy for an organization to demonstrate active community participation. The key point is that a true major gifts cultivation program is crucial to future financial success.

<sup>10</sup>Daniel H. Pink, *A Whole New Mind: Moving from the Information Age to the Conceptual Age*, (Allen and Unwin, 2005) pp 207–222. Pink identifies the search for meaning as a key characteristic of American culture in the next half century.

# THE NEXT CLIVEDEN: A NEW APPROACH TO THE HISTORIC SITE IN PHILADELPHIA

By David W. Young

A few years ago in the Germantown section of Philadelphia, Upsala, one of the neighborhood's 13 historic house museums, watched its attendance dwindle along with its endowment as it worked to address deferred maintenance and rising costs. With the difficulties it was facing, the Upsala Foundation sought a merger with its larger neighbor across the street, Cliveden, a Georgian mansion that is a co-stewardship site of the National Trust for Historic Preservation. Yet Cliveden was facing attendance problems of its own. In spite of its remarkable history, Cliveden has averaged just 3,000 visitors a year.

During discussions about the merger, Cliveden proposed turning Upsala into a visitor center for the historic Germantown neighborhood which is known for its colonial history. But a critical question was posed late in the process, "Why a multi-million dollar visitor center for only 3,000 visitors?" At that moment Cliveden embarked on a period of organizational planning that has resulted in a new mission and a renewed sense of purpose in the community, which now suffers from acute poverty and crime. The effort has involved planning, collaboration, new approaches, and staff changes. It has also involved coordination among staff and board, with sister institutions and other community partners, and across different departments of the National Trust.

## BACKGROUND: A TALE OF TWO HOUSE MUSEUMS

Cliveden, a National Historic Landmark, was built as a summer home by prominent colonial jurist Benjamin Chew in 1767. Located on six acres in the heart of Philadelphia's densely populated Germantown neighborhood, Cliveden was the site of the Revolutionary War Battle of Germantown, and home to the Chew family until 1972. During the 1777 battle Cliveden withstood an onslaught, and bullet holes and scars from cannon fire are still visible on the walls. A co-stewardship site of National Trust, Cliveden is managed by a local board of directors. Two floors of exhibit rooms display furnishings, paintings, and decorative arts owned by the Chews, including masterpieces of 18th-century Philadelphia craftsmanship. The museum building also houses additional offices and storage space for its 4 full-time and 22 part-time employees and guides, as well as hosts the Northeast Field Office of the National Trust.

By 2000 declining attendance and dwindling resources had forced Cliveden's neighbor, Upsala, to seek alternative forms of stewardship. In 2004 Upsala (c. 1798) merged with Cliveden following a planning process. Today Upsala is used on a limited basis for Cliveden's education initiatives, such as an after-school program and adult education classes, while Cliveden manages the site's maintenance.

The merger served as a catalyst for change and sparked a long-range planning process which has helped to define Cliveden's current mission, which emphasizes community revitalization, education, and preservation action.

## THE PLANNING PROCESS

In 2003 Cliveden commissioned a site master-planning process conducted by the landscape planning firm Olin Partnership and the architectural firm of Atkin Olshin Lawson-Bell, and funded by the Heritage Philadelphia Program of The Pew Charitable



Cliveden, a National Trust Historic Site in Philadelphia, Pa., is trying new approaches to traditional programming and adding new programs designed to involve community members. Photo by Ron Blunt, courtesy of the National Trust for Historic Preservation.

Trusts. This plan began to assess and articulate the options for the expanded physical capacity of the site. Simultaneous exploration of possible programming directions for the Cliveden/Upsala property involved representatives from the National Trust for Historic Preservation, the McNeil Center for Early American Studies, Cliveden's staff and board members, funders, and directors of other historic sites.

A two-day planning meeting held in January 2004 and facilitated by museum consultant Chris Mekal, yielded five potential programming models. The Strategic Planning Committee of the Cliveden board spent the spring and summer months of 2004 crafting a plan that pulled the strongest elements from the five models to create a vision for the future. The resulting document, *The Next Cliveden: Moving Forward with Our Community and The National Trust for Historic Preservation*, approved in December of 2004, charts a dramatically new direction for Cliveden:

“Cliveden sees its future in building a closer relationship with its community and with the National Trust for Historic Preservation drawing on the strengths and resources of both to provide leadership to save our diverse historic places and revitalize our community. We believe that allying Cliveden more closely with our community is vital to ensure our own long-term viability and vitality and we hope to provide a model for the development of community revitalization activities for the National Trust.”

In April 2006 Cliveden's new mission was formally approved: “to help people understand our shared history and motivate them to preserve it by providing access to

the rich continuity of history and preservation in one community and family over time, and by offering direction and knowledge about preserving our built heritage and its value.”

## CLIVEDEN'S NEW DIRECTION: THE SETTING

The new direction came about partly from Cliveden's own experience, partly from its community context, and partly from planning underway at the National Trust. Cliveden had attempted to capture tourists who come to Philadelphia, yet the site's location in northwest Philadelphia, some six miles away from the downtown area and the city's most popular attractions, have made heritage tourism less than an ideal growth market. Furthermore, a major tourism marketing study for Philadelphia's Historic Northwest in 2001 indicated that Germantown's historic house community should focus on more-recent history rather than on the revolutionary and colonial heritage.

Cliveden's immediate neighborhood is challenged economically. Germantown, founded in 1683 and incorporated into the city in 1854, went through a major population shift in the 1950s. Census records from 2000 show more than 20 percent of the population of 46,000 is below poverty level. Germantown is very historic, with important landmarks in America's political, industrial, and social history. The history of the community is evident even beyond its 13 historic sites, as many churches, neighborhoods, and schools are centuries old. The 2000 census listed more than 10,000 homes that were built before 1930. While there is a great interest in history within the region, the economic revitalization of the community

has been hampered by lack of jobs or investment. Germantown needs more active approaches to economic revitalization within historic preservation.

Since the 1980s the National Trust has built community revitalization programs to leverage resources for creative re-use of neighborhood assets, most notably through the Main Street program. In the late 1990s, the *Preservation Development Initiative* involved a lot of activity within Philadelphia and seven other cities. Within this climate, the discussions during the Cliveden/Upsala merger wrestled with how to avoid the pitfalls of declining attendance or dwindling interest in colonial history. The consideration of the community's needs began to emerge more formally, resulting in discussions of how Cliveden/Upsala could become a site that provided resources and focus to the National Trust's activities, not just in the realm of historic sites but in terms of community revitalization as well.

## CLIVEDEN'S NEW DIRECTION UNDERWAY

Cliveden has moved ahead accordingly, trying new approaches to traditional programs and adding entirely new programs as well. Curriculum-specific programming targets fourth- and fifth-grade students in Philadelphia's public schools; an after-school program in creative writing attracts middle- and high-school age students from the city and nearby suburbs who are self-selected to participate. Local community organizations use Cliveden's Carriage House for evening meetings and events for their members.

A partnership with the Preservation Alliance for Greater Philadelphia has attracted hundreds of local residents to workshops on preservation techniques for older houses.

Thousands of visitors participate in annual events such as the summer Jazz Fest and the community-wide Revolutionary Germantown Festival. On-site surveys have shown that these are predominantly local residents, reflecting a range of economic and racial backgrounds. Many attendees at these events have never toured Cliveden or attended other programs at the site. And Cliveden has been prominently involved with the business community; its director is a founder of the Germantown Avenue business improvement district.

Cliveden has also employed the resources of the National Trust, actively working with the community revitalization department and with the Northeast Field Office. Cliveden is working with the National Trust's Department of Community Revitalization and a neighboring community development corpo-

ration to implement a revitalization plan two blocks away from Cliveden.

Cliveden has moved forward by collaborating with partners both traditional (other historic sites) and non-traditional (community development corporations). Its new approach has meant providing the community with use of the site for everything from meeting space for youth programs of the local police district to storage space for the sidewalk sweeping equipment of the business improvement district. Bringing National Trust resources where appropriate has been the rule, such as with board development consultants and community revitalization planners. In many ways the synergy among the departments of the National Trust uniquely positions Cliveden to put more of the Trust's programs into action in the Germantown Community.



Faced with declining membership, Upsala merged with Cliveden in 2004. The site is now used for Cliveden's education initiatives, such as after-school programs and adult education classes. Photo courtesy of Cliveden.



## PROGRESS AND LESSONS LEARNED, SO FAR

The full support of Cliveden's board of directors has been essential in bringing about this change of direction. Cliveden was well prepared to make substantive changes, and the board was able to move from the planning process to community focus in a manner engaged by board members, staff, and committees alike. Conducting a search for a new director made the board articulate its new vision and hire accordingly. Community support has been strong, with three different community development corporations assisting on Cliveden projects. The other historic sites of Germantown have contributed with a 2007 planning grant for the consortium of sites (called Historic Germantown Preserved), which has provided excellent input from the local community.

There are several other encouraging signs of success. While museum visitation has remained consistent at 3,000, the number of people served has increased by over 40 percent in the last two years. Donations, grants, and memberships in Cliveden have increased, with sponsorships and business memberships indicating the support of some community partners. Ongoing evaluation will continue to be important, particularly since attendance will not tell the full story of Cliveden's activities.

One surprise from Cliveden's first years under the new long-range plan is the "as well" factor. Cliveden's role in the community is not simply one of either-or: Cliveden cannot be either a traditional house museum or doing more community programming. Cliveden has to be both.

It still has to perform the traditional duties at a high level, such as scientifically preserving the buildings and offering the most up-to-date interpretation on tours. The work plans and priorities each year reflect movement on both the traditional museum as well as the community initiatives.

Cliveden's new approach is building an organization that transcends the traditional house museum model of the "velvet rope tour" for visitors. The plan is based on the belief that long-term sustainability for Cliveden lies more in community engagement than in tourism. Four years into the long-range plan, the response has been encouraging, and, given the issues facing historic house museums across the country, the experiences of Cliveden and Upsala may be helpful for other historic sites finding traditional approaches challenged by daunting contemporary concerns.

*David W. Young has been executive director of Cliveden since 2006. Before that he was director of the Johnson House Historic Site, also in the Germantown section of Philadelphia, Pa. Mr. Young attended the National Trust's Preservation Leadership Training in 2006.*

# BRUCEMORE: A CULTURAL CENTER FOR CEDAR RAPIDS

By James F. Kern

Brucemore tells the story of three wealthy families: industrialists, entrepreneurs, philanthropists, boosters, neighbors, and friends. The men created great fortunes: Thomas Sinclair in meatpacking; George Bruce Douglas in starch processing; and Howard Hall in manufacturing. However, the women of Brucemore are at the heart of the story: Caroline Sinclair built the mansion; Irene Douglas transformed it to a country estate; and Margaret Hall gave it to the National Trust for Historic Preservation. Now honoring the fortunes, legacies, and influence of the families, Brucemore has also become the community's home.

Set on a scenic 26-acre estate with 9 buildings, the 21-room Queen Anne-style mansion is the centerpiece of an active historic site and cultural center. Brucemore has positioned itself as one model for many house museums working to extend their missions to new and broader audiences. Capitalizing on the size of the estate, its central location in the city, and the prestige of being the only National Trust Historic Site in the state of Iowa, Brucemore is dedicated to offering an ambitious line-up of events and programs for the benefit of the community. Although the vitality of the site is a source of pride for the community, protecting and preserving the buildings and grounds for the education and enjoyment of generations to come is equally essential. Careful planning, constant vigilance, ongoing evaluation, and a sound preservation ethic are at the

core of Brucemore's dual mission to serve as a historic site and community cultural center.

These goals are spelled out in the site's mission and vision statements:

**Mission:** To engage the public in the history, traditions, resources, and ongoing preservation of Brucemore for the enrichment of the community.

**Vision:** To be a premier National Trust Site through excellence in stewardship, education, preservation, and programming for the benefit of the community.

## ORIGINS AND DEVELOPMENT AS A COMMUNITY CULTURAL CENTER

Cedar Rapids has always had a love affair with Brucemore. Throughout its history as a private residence, the families of Brucemore engaged the community in many ways. Brucemore has been a magnet for a variety of activities — including hosting the first Cedar Rapids Garden Show, fundraisers, cotillions, recitals, and receptions for United States presidents, as well as providing the gathering place for Howard Hall's eclectic group of fellow entrepreneurs affectionately named "the Sunday School." When Margaret Hall deeded Brucemore to the National Trust, she stipulated her desire to see her home used as a community cultural center. Clearly, Mrs. Hall's wishes have guided the interpretation and function of Brucemore

since becoming part of the National Trust collection in 1981.

Originally the National Trust determined that Mrs. Hall's assessment of her home as a community cultural center was an appropriate use of the site and did not designate it as a museum. The community, however, thought otherwise. The allure of the Brucemore mansion generated tremendous interest from residents and visitors. More than 3,000 curious people attended the first open house in September 1981. Mrs. Hall's home was coming to life in ways she could not have envisioned, and, without question, the community was eager to show its interest in and appreciation for her gift of the estate.

Within the first several years, holiday parties, corporate functions, interpretive tours, theater and concert performances, staff offices, and the museum store all contributed to non-stop activity in the mansion. Although all of the activity was welcomed and encouraged, articulating appropriate guidelines and policies for use of the historic buildings became a priority. Now that the public spaces on the main floor have been restored to the interpretive period of 1910–1925, activities in the mansion benefit from the grand setting. Even so, the guidelines for use stipulate appropriate capacity and care for the mansion.

## EXPANDING VENUES AND OFFERINGS

Brucemore hosts a variety of community activities which have grown as the estate has transformed. In 1982 the site became the home of the Cedar Rapids/Marion Arts Council's annual Fathers Day event, Celebration of the Arts, a festival of art



With only a few significant architectural modifications since its construction in 1884–86, Brucemore stands today as a striking example of the Queen Anne style. The mansion is the site of non-stop activity that includes holiday parties, corporate functions, interpretive tours, and theater and concert performances. Photo by Ron Blunt, courtesy of the National Trust for Historic Preservation.

and performances on the grounds. By 1986 Brucemore hosted its own large-scale event with Dixieland on the Green and began an eight-year partnership with Theatre Cedar Rapids to produce live theater in the Great Hall of the mansion. Brucemore's role as a community cultural center was increasingly vibrant.

The adaptive use of the carriage house as the visitor center in 1999 allowed access to a second historic building on the property and eased the level of activity in the mansion. The museum store, staff offices, and interpretive exhibits now had a new home. This expansion also invited the community to view Brucemore as a complete country estate. With the addition of the visitor center, the staff began to explore the possibilities inherent in multiple venues on the property. Today programs and events occur in seven venues in addition to the mansion: the visitor center for

meetings, lectures, small events, book signings, and hands-on workshops; the courtyard of the visitor center for large parties and Cabaret in the Courtyard; the natural amphitheatre by the pond for Classics at Bruce more, Cedar Rapids Opera Theatre, and Outdoor Children’s Theatre; the formal gardens and surrounding green space for tours, presentations, luncheons, and the Bruce more Garden and Art Show; the swimming pool area for receptions and parties; the Garden House for meetings, lectures, art shows, and retreats; and the First Avenue lawn for Balloon Glow and Blues more. By deliberately moving programs and events around the estate there is less potential for wear and tear at any one location and visitors can experience more of the site.

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“This is the story of a special place actively preserved and actively participating in the continuing story of its community.”

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The public treats the estate with tremendous respect and pride. Each summer 10,000 people attend Balloon Glow, and within 24 hours the grounds are cleaned up with rarely more than a few tire marks on the grass as evidence of the activity. Occasionally there are reports of people cutting flowers from the gardens, taking fruit from the orchard, swimming in the pool, and trespassing when the estate is closed. Even so, Bruce more is blessed with tens of thousands of courteous and respectful visitors each year. The accessibility and welcoming image of the site has made

Bruce more a treasured landmark in the community.

## MORE CREATIVE PROGRAMMING

In July 2007 Bruce more hosted the Joffrey Ballet for one of the most ambitious collaborative undertakings in the history of the area. Commemorating the 50th anniversary of the Joffrey and the 35th anniversary of Hancher Auditorium in Iowa City, the free performance on the Bruce more lawn attracted more than 7,500 ballet enthusiasts and curiosity-seekers from the region. The full-scale production involved eleven semi-trailers, two cranes, two motor coaches, nearly one dozen support vehicles, more than 100 technicians, the full Joffrey company of dancers and artistic personnel, and the entire Bruce more staff. The glorious evening offered the finest artistry under the stars in a historic setting, and was a consummate testament to Bruce more’s ability to host monumental and memorable events.

Education and entertainment are not mutually exclusive at Bruce more. In fact, many of the well-received educational programs have been presented in unconventional, entertainment formats. *Dear Sweetheart: the Letters of Howard and Margaret Hall* became a readers’ theater dramatization of the relationship between the Halls, presented through their letters and diary entries when they were apart. Humorous, poignant, sorrowful, and trivial, *Dear Sweetheart* included more than 200 images from the archives projected on a large screen behind the performers. This educational program became a perfect Valentines Day event, with champagne, roses, and chocolates included in the ticket price.



Brucemore serves as an active historic site and community cultural center. Here a band plays to a large crowd at the “Bluesmore,” a popular outdoor concert. Photo courtesy of Brucemore.

Perhaps the best example of sharing Brucemore’s history in unconventional ways was the 25th anniversary *Uncommon Kings* project. Local creative director, musician, and recording artist Gerard Estella had been contracted for a weekend of Cabaret in the Courtyard performances. The first half of Estella’s show featured original music, lyrics, and images that celebrated the inspiration of place — this place, Brucemore. According to Estella, “The production was not a historical retrospective or a tour of the Brucemore story. It utilized the uniqueness of Brucemore as a living, breathing testament to generations of human spirit and endeavor as the foundation for an artistic interpretation of Brucemore’s environment and the emotional impact it can have if given the opportunity to be witnessed. This is the story of a special place actively

preserved and actively participating in the continuing story of its community.”

In addition to the Cabaret performance, Estella produced a commemorative “coffee table” book filled with images and words inspired by Brucemore and created by professional photographers and writers. The book came with a CD of 14 original songs first performed in the Cabaret production, with lyrics drawn from archival material. Brucemore provided access to the site, collections, and archives to six professional photographers, two composers, four writers, and more than one dozen performers to develop *Uncommon Kings*.

The ongoing preservation, restoration, and conservation activities at the site serve an educational function for the community.

Teaching about tuck-pointing, book conservation, architectural restoration, and many ongoing maintenance projects provides an opportunity for Brucemore to serve as a



Brucemore's Cabaret in the Courtyard is a showcase for professional performers with roots in Cedar Rapids. Photo by Greg Billman, courtesy of Brucemore.

laboratory for local artisans and tradespeople to improve craftsmanship with historic materials. Whenever there is an enrichment experience for citizens to learn valuable preservation skills through Brucemore projects, everyone wins, and the Brucemore mission is fulfilled in unique ways. Strengthening the community's investment in the preservation and utilization of the site is critical to Brucemore's sustainability.

## A MODEL FOR CONTINUING RELEVANCE

In the last 30 years there has been an explosion of house museums across the country. Even with the expansion of cultural tourism and the desire for authentic experiences, many house museums and

historic sites have experienced a drop in visitation. Brucemore has bucked the trend and stands today as a shining example of a model historic site. By thinking beyond the traditional models, by opening the doors for unconventional experiences, and by welcoming the entire community, Brucemore has positioned itself to continue its relevance into the foreseeable future.

James F. Kern became executive director of Brucemore in 2007 after serving six years as the assistant director. In 1996 he co-founded the popular outdoor theatre series Classics at Brucemore.



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