

**Reimagining Historic Sites:
A Vision for the Future of National Trust Historic Sites
January 2014**

The National Trust for Historic Preservation was chartered by Congress in 1949 to provide for the preservation of historic sites and to facilitate public participation in the preservation of historic places.

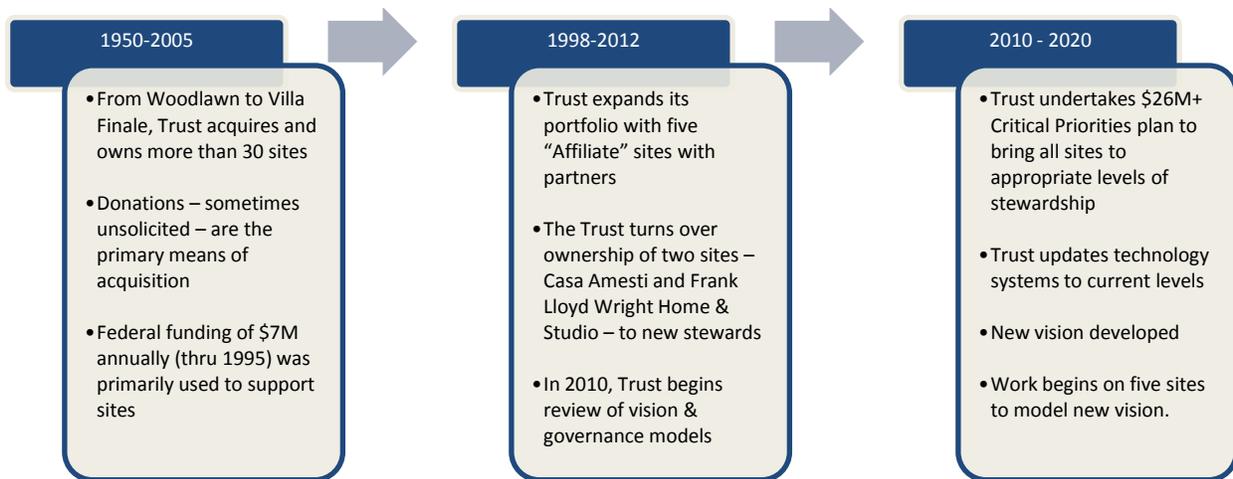
An Act to provide for the preservation of historic American sites, buildings, objects, and antiquities of national significance, and for other purposes, and to facilitate public participation in the preservation of sites, buildings, and objects of national significance or interest, there is hereby created a charitable, educational, and nonprofit corporation, to be known as the National Trust for Historic Preservation in the United States, hereafter referred to as the "National Trust." (Congressional Charter, 1949)

Setting the Context

In response to this charter, the National Trust has acquired and maintained more than 30 historic sites in its almost 65 years of existence. Each was important in its own way but the sites were generally acquired without an overarching vision that articulated:

- **Why** the site fit into a portfolio of National Trust sites
- **What** would be done to promote larger preservation and engagement goals, and
- **How** we would support the preservation of those sites and engage the public in meaningful ways as part of a growing portfolio, especially in light of changing public funding.

The Trust operated in this fashion into the 1990s, supported by a \$7 million annual federal appropriation that was largely devoted to the historic sites. In the 1990s, the goal was set to move all Trust sites to a co-stewardship relationship, where they would be operated by a separate non-profit or governmental partner, yet no clear plan for implementation was adopted. At the same time, the portfolio was expanded with the addition of five "affiliate" sites, which were neither owned nor operated by the National Trust, but existed in a partnership and marketing relationship with the organization.



Transition in Leadership Leads to Work on a New Vision

In 2010, under new executive leadership, the National Trust began a comprehensive review of the Trust vision and governance models for its historic sites. At the same time, recent investment by the organization was designed to address our stewardship responsibilities.

- A five-year comprehensive Critical Priorities program, stretching from 2011-2015, was undertaken to assess and address risks at Trust sites related to imminent loss of historic fabric, life safety, and outdated infrastructure.
- The Trust has spent or identified \$10.5 million of the estimated \$25.397 million total cost. The gap is to be filled by gifts received through the Trust's national fundraising campaign. By the conclusion of FY14, 42% by cost and 50% by number of 138 total projects will be completed; 93% of all projects will have been initiated.

In addition to the Critical Priorities campaign, additional Trust investment at the historic sites includes:

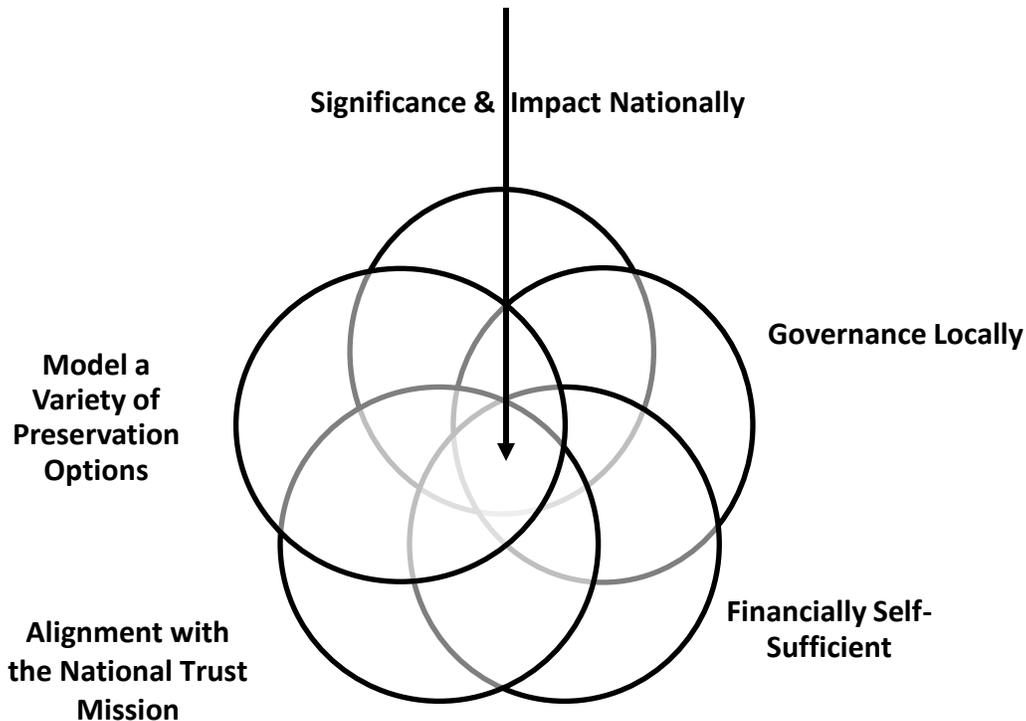
- **Finance & Management**
 - Sites involvement in Constituent Relationship Management (CRM) development to support the Trust's new business/membership/fundraising system
 - Phone system and Point of Sale system upgrades
 - Supervisor training + Leadership development program/emerging professionals network
- **Marketing**
 - Re-branding/logo work at sites
 - Travel media outreach for sites
 - In-kind paint program donations – expanding to stain in 2014
 - Continued help with marketing assistance
- **Development**
 - Sites included in Principal Gifts prospect review to close Critical Priorities gap
- **Legal**
 - Contracting assistance on Critical Priorities
 - Legal and Preservation staff assistance at Treasure sites
 - Ongoing Legal work at sites

Senior management, in close collaboration with the Board of Trustees, began work in 2012 on an innovative vision for National Trust sites that moves away from old assumptions and practices to provide direction to support enduring public value – as well as creating new value for an expanded public. The vision is designed to ensure clarity around the Trust/Site relationship in terms of national significance and impact, local governance, financial self-sufficiency, alignment with the National Trust mission, and exploration and adaptation of new models of preservation. A ten-year implementation plan is envisioned, to provide guidance to senior management and volunteer leadership. In this vision:

- The National Trust ***intends to retain ownership*** of those sites it currently owns and continue the engagement and integration of these places into the overall Trust strategic vision and work
- ***Stewardship of the physical assets*** will remain a primary concern of the National Trust
- The National Trust values of ***collaboration, innovation, diversity, integrity, and making a difference*** are at the heart of this vision

A New Historic Sites Vision: Clarity Brings Alignment

National Trust Sites are places of national significance or impact where a variety of ownership, stewardship, business, use, and engagement practices flourish to advance the National Trust mission and model the many options for preservation



The new vision for National Trust Sites calls for alignment and clarity around five key elements of the National Trust/Historic Site relationship. Each is important, but it is when all five are in play that National Trust Historic Sites reach a transformative level of impact in the context of the work of this 21st century historic preservation organization.

Significance and Impact Nationally

In alignment with our Congressional charter, the new vision calls for National Trust sites that exemplify places of national significance or where the work has national impact.

As a nationally-facing organization with limited resources, the Trust focuses on places where our contributions are essential to success on nationwide issues. The vision calls for national significance and/or impact. Significance speaks to what has happened; impact speaks to our work in the future.

Two-thirds of the current portfolio is easily identified as nationally significant, given those sites' designation as a National Historic Landmark, National Monument, National Park, and/or Nationally Significant National Register Property.

In terms of the national impact of current work, one can look to these five examples:

- The forward-facing efforts of the Robert H. Smith Center for the Constitution at Montpelier,
- The national leadership issues under study at the David M. Rubenstein National Center for White House History at Decatur House,
- The Lower East Side Tenement Museum's emphasis on immigration issues in the 21st century,
- The current work on human trafficking taking place at President Lincoln's Cottage, and
- The Glass House's service as a canvas for inspiration and experimentation honoring the legacy of Philip Johnson and David Whitney.

For National Trust sites that have not traditionally focused on the national impact of their programs and outreach, we will work with staff and volunteer leadership to identify the opportunities to expand the reach and influence of both their mission and daily activities.

Locally Governed

The new vision affirms the belief that local governance models ensure strong oversight and connections with the local community. The concept of local governance is not based on zip code, but is tied to the concept of local community for the site – which may be local, national, and/or international in nature. Sites with this model tend to demonstrate a strong connection to their history, to their stories, and to their communities and their needs today.

With this affirmation, the National Trust will work on a site-by-site basis with current and new partners to transition to appropriate local governance, management, interpretation, and ownership models that demonstrate the various pathways for preservation. Board building will be a key undertaking. Models for local governance could include co-stewardship with a nonprofit organization, affiliate status with a nonprofit or governmental organization, and private owner lease/management, among others.

Two sites – President Lincoln's Cottage and Drayton Hall – have self-selected to pilot the transition to new versions of local governance. The Trust is working with their staff and advisory councils to develop a governance agreement in alignment with the vision for historic sites.

For other sites currently in a stewardship arrangement, where the National Trust both owns and manages the property, we will begin individual conversations with those directors and boards to discuss readiness to move towards local governance in the context of a ten-year implementation plan. The Trust – using materials piloted for President Lincoln's Cottage and intended for testing and refinement in the years ahead – will provide staff and councils with an increasingly sophisticated set of tools to help determine local governance readiness and impact.

Financial Self-Sufficiency

The new vision also calls for sites to have a financially sustainable business model that ensures self-sufficiency. The National Trust and the sites are expected to understand their business and move to change unsustainable models based on common but out-dated assumptions. Long-term financial self-sufficiency is understood as a key to responsible stewardship.

Sustainability of the physical assets (buildings, grounds, collections) – including funding for cyclical maintenance – is a critical part of financial self-sufficiency. Capitalization costs of facilities must be understood and accounted for in both short-term and long-range financial planning. Endowments are often an important element in financial self-sufficiency, but in healthy organizations should not be used

for more than 20% of the annual operating budget. They can also be important elements to support cyclical maintenance budgeting.

In implementing this new vision, the National Trust will work closely with site leadership to identify and develop recurring revenue streams to cover robust operations, programs, and cyclical maintenance needs. New and non-traditional models for historic site revenue, such as those under consideration in the shared use concept for Cooper-Molera Adobe, will be identified and supported as appropriate.

Alignment with the Trust Mission

With the development of a new vision, the National Trust assumes the continuation of a portfolio of historic sites where the alignment between sites and the National Trust charter and values is easily articulated and recognized. Just as this vision describes the National Trust relationship to its historic sites, individual sites should articulate how they align with the Trust mission as defined in our charter: to provide for the preservation of historic sites and to facilitate public participation in the preservation of historic places. Trust sites – each in their own ways – should reflect the Trust values of collaboration, diversity, innovation, integrity, and making a difference.

Each site will articulate this alignment in different ways. Examples may include mission statements, strategic plans, programmatic collaboration, links on web sites, inclusion in guide training, joint branding, and presentations as part of visitor tours, among a host of other options. As each site moves to implement the elements of this vision, National Trust staff will work with the site staff and volunteer leadership to craft an appropriate alignment strategy.

Exploration and Adaptation of New Models of Preservation

Finally, the new vision calls for a variety of uses and preservation techniques to be modeled across the portfolio of sites. Adaptable plans for use of the site ensure long-term preservation and sustainability.

The Trust will work with current and new partners to consider and ultimately adopt new models for sites use that ensure financial sustainability in support of preservation, engagement, and interpretation goals. It is expected that many sites will model more than one use. Concurrently, Trust staff and financial assets will be focused more than ever on preservation of the physical fabric.

The five examples below are illustrative of the range of uses and preservation models that are either already in place in our portfolio or are contemplated in the near future:

- Several of our historic sites – such as Drayton Hall – will retain a primary focus as museums. Like this Charleston site, these museums will offer a variety of cutting-edge educational programs, engage in preservation issues outside the site, expand outreach through online tools, and exhibit a range of 21st century best practices in collections curation, education, and stewardship.
- Decatur House in Washington, DC, has moved under the leadership of our co-stewardship partner – the White House Historical Association – from a traditional house museum to an educational and cultural center through the David M. Rubenstein National Center for White House History at Decatur House. The center provides ongoing educational programs for students, teachers, scholars, and the general public on the history of the White House and the President's Neighborhood and has ambitious plans for growth.

- Brucemore – the National Trust site in Cedar Rapids, Iowa, administered by Brucemore, Inc. – has a long history as a center for community cultural activity and outreach, including major music and theatre festivals, an Independence Week Balloon Glow, and musical salons.
- The National Trust is working with California State Parks and local stakeholders at Cooper-Molera Adobe in Monterey to re-envision what is now a traditional house museum open by appointment only into a vibrant shared use interpretive/commercial site. This shared use approach can help provide the resources to tell a more layered and rich story of the Cooper and Molera families while helping reinvigorate the local Main Street historic district.
- Also in Monterey is the only existing example of a National Trust historic site that has been conveyed to private ownership. Casa Amesti is now owned by a private club which has maintained it to preservation standards included in a permanent covenant. The site also has requirements for public access at certain times of the year. This move to private ownership was seen as a way to ensure continued use of an important historic site which was not well suited as a museum, maintain some public benefit, and ensure financial sustainability.



Sites adopt a variety of models to ensure sustainability

Implementation

Senior management – in growing consultation with senior management of the sites – has begun work on a ten-year transition plan that is over-arching *and* site-by-site focused, addressing questions around

- Roles (What roles will the Trust and sites play in the future of each site?)
- National/local balance (What is the connection between a national site and a local steward/partner?)
- Capacity (How do we know when a site is ready for the next step? The Trust?)
- Self-sufficiency (What ensures financial support, sustainability, and self-sufficiency?)
- Stewardship (How do we ensure care of the physical assets?)

FY11-FY13

The Trust took steps in each of these elements over the past three years, by defining an overarching vision, beginning the first exploration of options for revised or new relationships (e.g., Frank Lloyd Wright Home and Studio, Cooper-Molera Adobe) and beginning work on new local governance relationships with two stewardship sites that had self-selected to move forward to transition (i.e., Drayton Hall and President Lincoln's Cottage).

Three sites (Cooper-Molera Adobe, Woodlawn, and Lyndhurst) began re-visioning work using the Trust's new National Treasures campaign model, while institution of new financial tracking systems, initial work on a CRM system, and identification of training needs were among the first steps taken toward self-sufficiency. Finally, the identification of critical priorities and the undertaking of a multi-year approach to address them were the first steps toward an appropriate level of preservation stewardship.

Piloting the Vision: FY12 – FY15

Five sites are well into the work to pilot this vision. Drayton Hall and President Lincoln's cottage – current stewardship sites – self-selected to begin the move to new local governance models under the larger umbrella of the new vision for sites.

At the same time, the Trust began National Treasure campaigns at Cooper-Molera, Woodlawn, and Lyndhurst, bringing the full resources of the organization to help determine their future. Each has its own challenges and opportunities, and each is on a very different path towards realizing the five-part vision of a 21st century National Trust Historic Site.

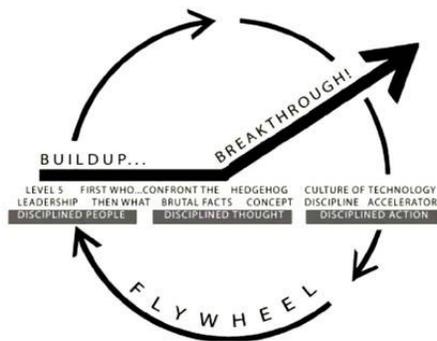
Longer Term Implementation

As transitions are made at these five sites, the Trust will work with senior leadership across the portfolio to assess impacts, recalibrate the plan as needed, help build stronger local boards, and move forward with transitions at additional sites. Next steps:

- Initial conversations with stewardship sites over the coming months will be set to identify the specific work for transition. The conversations will take place with site directors and councils in 2014, to begin the long-term implementation planning.
- Conversations with existing co-stewardship and affiliate sites in 2014 will focus on elements of the vision at the site where strengthening is needed for success. While each conversation will be different, the initial focus on roles, national/local balance, capacity, self-sufficiency, and stewardship will guide these discussions. It is also our goal to include cyclical maintenance provisions in each site budget in the FY15 – 18 timeframe.

The spring site directors' meeting and the fall gathering at the National Preservation Conference in Savannah will serve as opportunities for cross-portfolio updates and conversation on progress and work to be accomplished.

The headquarters infrastructure to support this new vision will need to be shaped over the next three years. New support systems and new ways of working will be required for successful implementation.



With a sustained focus on implementing this new vision for sites – building upon three years of analysis and preparation – the goal is to reach the stage where the flywheel effect accelerates this work, as success encourages more sites to move towards full embrace of a vision where:

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National Trust Stewardship Sites (2013)

- Chesterwood, Stockbridge, MA
- Drayton Hall, Charleston, SC
- Farnsworth House, Plano, IL
- Gaylord Building, Lockport, IL
- Lyndhurst, Tarrytown, NY
- Philip Johnson’s Glass House, New Canaan, CT
- President Lincoln’s Cottage, Washington, DC
- Shadows-on-the-Teche, New Iberia, LA
- Villa Finale, San Antonio, TX
- Woodlawn and Frank Lloyd Wright’s Pope-Leighey House, Alexandria, VA
- Woodrow Wilson House, Washington, DC

National Trust Affiliate Sites (2013)

- Acoma Sky City, Acoma, NM
- Hotel de Paris, Georgetown, CO
- Lower East Side Tenement Museum, New York, NY
- Museum of African American History, Boston and Nantucket, MA
- The Touro Synagogue, Newport, RI

National Trust Co-Stewardship Sites (2013)

- Belle Grove, Middletown, VA
- Brucemore, Cedar Rapids, IA
- Cliveden, Philadelphia, PA
- Cooper-Molera Adobe, Monterey, CA
- Decatur House, Washington, DC
- Filoli, Woodside, CA
- James Madison’s Montpelier, Orange, VA
- Kykuit, Tarrytown, NY
- Oatlands, Leesburg, VA