Stepping into the Future at Historic Sites
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Cover: President Lincoln's Cottage at the Soldier's Home,
Washington, D.C.
Photo: Courtesy President Lincoln's Cottage

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Stepping into the Future at Historic Sites

STEPHANIE MEEKS

Today we take house museums for granted. But it wasn’t always this way. When Ann Pamela Cunningham and her indomitable Ladies’ Association rescued Mount Vernon 150 years ago, they were true innovators.

Generations have followed their model, and we now have some 15,000 historic house museums nationwide—more than three for every county in the country if they were evenly distributed. These places include some remarkable examples of success—Mount Vernon, for instance, remains a leader and innovator—and they represent a powerful legacy for future generations.

Yet underneath this success, there is a difficult truth: House museums on the whole, including some of the National Trust’s own historic sites, are in tough financial straits.

We can point to a variety of culprits, from shrinking public cultural budgets to increased competition for visitors. But the bottom line is that the world has changed dramatically since the mid-20th century, when many of these house museums were created. These places, and the lessons they teach us, are as relevant as ever, but the traditional velvet ropes and timed tours have lost their luster for a generation with infinite entertainment possibilities at its fingertips.

To save these places, we must be willing to challenge our own ideas of preservation and consider new models. Toward that end, the National Trust sponsored a leadership forum at Kykuit, a National Trust Historic Site in New York State, several years ago, and in 2012 we secured a grant from the Innovation Lab for Museums to support prototyping at our own network of historic sites.

Promising work is already underway. In some cases, a fresh approach to interpretation, one that underscores a site’s relevance to today’s audiences, can make the difference. For instance, President Lincoln’s Cottage, a site with a reputation for innovation, attracted new audiences—and won two awards—with an exhibit that makes the connection between slavery and human trafficking in modern times.
At other sites, more dramatic reinvention will be required. We may need to consider re-purposing these museums as community centers or commercial properties, or returning them to private residences. Woodlawn Plantation in Virginia provides one example of how that model could work. The property has been managed as a house museum for 50 years, but has a long history of pioneering experimental agriculture. The National Trust has partnered with the Arcadia Center for Sustainable Food and Agriculture to reinvigorate the site’s connection to experimental agriculture and connect it with the current locavore movement.

Since 2010 Arcadia has farmed about three acres at the site, where the growing, harvesting, and even cooking of the vegetables, honey, and eggs that are produced there are used in on-site school programming. We are now looking to expand this partnership to encompass the entire 126 acres, moving toward a farm-to-table destination focused on the visitor experience, incorporating gardens, and expanded educational offerings.

And, at Cooper-Molera Adobe in Monterey, California, a proposal to bring commercial uses to the property aims to preserve the adobe, make it widely accessible, and help revitalize downtown Monterey, while ensuring the property’s long-term financial sustainability and
stewardship. A house museum for only 30 years of its nearly 190-year history, Cooper-Molera has seen many uses over its life, including as a general merchandise store, tavern, beauty shops, dance studio, and offices.

The National Trust is exploring a long-term lease arrangement with a preservation-sensitive developer to re-imagine the space. We envision the installation of restaurants, repurposing the barns as event space, reopening long-closed gates to better allow the public to enjoy the gardens and orchards as well as providing site interpretation and educational programming.

Reinvention on this scale is challenging, and sometimes controversial. It requires us to face hard realities and be daring in our choices. We can shrink from these challenges, or rise to them. We have more than enough innovation, creativity, and passion to succeed. So, let’s be bold and forge ahead with a zest for what’s possible. FJ

STEPHANIE K. MEEKS is the president and chief executive officer of the National Trust for Historic Preservation.

**TAKEAWAY**

For updates on National Trust Historic Sites follow the PLF blog.
Reflections on the Senses of Place

ESTEVAN RAELEÁLVEZ AND CINDI MALINICK

This essay is a reflection based on the sojourns of two colleagues and friends, revealing how important the senses are to the power of place, the beauty and understanding, the sorrow and growth, which can be found at these places of memory.

Human senses are as ancient as the people who originally perceived them, beheld them, and realized that above all, they were what most made them human. Our senses are so essential to moving through the world, defining, nourishing and sustaining body and soul. Just as the five senses make the human being, places hold the promise of awakening the senses. Commenting on Aristotle’s Categories, the mathematician and astronomer Archytas wrote that “place is the first of all of beings, since everything that exists is in a place and cannot exist without a place.” Recognizing how rich in spirit place is, its characterization as the “first of all beings” also implies that places are alive and meant to breathe, and thus, meant to evolve. As such, places can provide a platform for deep sensory engagement with those who want to know more about them.

We use our senses even in the mere approach to a historic site: first simply looking at it, absorbing the grandeur or simplicity of glass, wood, mud or stone carefully assembled; setting foot, touching dirt and ground, grasping and opening the door; hearing a greeting from a knowing voice, listening to the creaking floor, or the sound of an old record playing in the drawing room; absorbing multiple and intersecting smells of antiques, linens or fresh flowers wafting through the air. Houses, theaters, storefronts, bridges, cemeteries, and so many more places of memory offer the opportunity to engage people and to remain relevant; but even more, they carry the promise of a greater ascent for visitors, not only of imagination and memory, but the potential to move people to a contemplative state.

Historic sites then, with their ultimate raison d’être of informing, illuminating and inspiring, hold astonishing possibilities to advance
intellect and understanding through engaging the senses, particularly to raise consciousness, strengthen community and nurture creativity.

**SIGHT**

Storytellers, philosophers and poets have all mused on the importance of the sense of sight, especially its supremacy, connecting it directly to the metaphors of knowledge.

The world is rich with the visibly tangible, both the built and the natural—there, beside the rivers, beyond the trees, in the middle of crowded streets, and on top of the ground sit structures of all types, some set within meadows, others beside mountains or within watersheds. How these buildings were designed reflects an artistic eye that can convey symmetry, simplicity or strength. What draws the eye could also be the unique texture of a wall, a lintel carved with ornamental scrollwork, or a floor-to-ceiling window with bent glass in an unexpected place. In this way, seeing is about taking the world into our bodies through our eyes.

When encountering historic sites, the ultimate objective should be to do more than simply gaze upon landscapes, structures or objects, but instead to look more closely at what we see with a critical perspective that considers varying points of view.
But seeing depends upon where we are standing, as we each bring our own experiences and thoughts to our perceptions. After Aby Warburg, one of the founding fathers of art history and an eminent specialist in the Renaissance, approached New Mexico’s Acoma Pueblo in 1895, he captured in writing what he saw from what he knew before, when he wrote, “The village emerging from the sea of rock, like a Heligoland in a sea of sand.” The heirs of Acoma had then and hold still in reverence and awe the truth that everything, seen and unseen, was connected. Yet, for Warburg, a visitor, it could only be comprehended in comparison to something he knew.

As a way of encouraging an active assessing with our eyes, juxtaposition is a possible means to this end. Glass houses are designed in part to consciously blur the line between inside and outside, and Mies van der Rohe’s Farnsworth House demonstrates this beautifully. Beyond its iconic design, however, we were wonderfully challenged by a recent outdoor exhibition installation at the site, Translocations: Mies and Melnikov, and its stark effect upon the purity of the structure and the landscape—an effect that engendered new ways of seeing it.

Planned by artist and professor Osvaldo Romberg, the exhibit, was conjoined to the modernist masterpiece, referencing the iconic circular floor plan of the brick Konstantin Melnikov House in Moscow. Though Romberg’s objective was to contrast transparency and opacity, in part representing the societal differences of the United States and the then Soviet Union, we also knew and experienced the disruption this piece injected at the site, offering us, and all who visited during the installation, a different perspective, to consider its meaning, its purpose, in a very dissimilar way.
Like juxtaposition, visiting, sensing—seeing—a new place anywhere in the world expands our perspective and holds the potential to foster understanding, empathy and tolerance. One of the most beautiful places on earth to behold in the world with your eyes is Istanbul, Turkey; and the historic sites, the sacred sites, are plentiful, including the Hagia Sophia, the Blue Mosque, and Topkapi Palace. Beneath a large public square in Istanbul is another place of memory, an underground chamber vibrant with haunting visuality despite its dark location—the Basilica Cistern, constructed in the 6th century by Emperor Justinian the Great. Before one descends into the Cistern, the sound of adhan, the powerful and melodic Islamic call to prayer fills the air. Encountering the 336 marble columns supporting vaulted ceilings soaring to 30-foot heights, citizens and others from around the globe appreciate the Cistern’s atmospheric lighting, and are also greatly affected by another sense in the space, that of sound—water softly lapping against the walls, evening poetry reading, Sufi Jazz concerts and Ney concerts during Ramadan’s month of fasting.

SOUND
Many have contemplated the sense of sound and its earliest connections to life, especially thinking of human development in utero, over 40 weeks with the reverberations of a mother’s throbbing heart pulsating through its watery world. No wonder we are drawn to voices, with their lilting cadences; to music, with its lush chords or syncopated rhythms; to the chirping sweet songs of the sparrow; to rain pouring down onto a tin roof; to crashing waves upon the shore.

Serving as channels to embed feeling, learning—places of memory offer spaces uniquely positioned to provide connections with what is truly important, through voice, through conversation, through music.

Because music can touch the secret part of our soul so deeply in historic sites, house museums in particular—once lived in—should seize the boundless opportunities harmonic sounds offer. Surely the sound of music was once almost ordinary in these places, with residents and guests gathering to listen to music or sing to themselves. Where pianos or harps sit quiet now, they once were
played, and historic places can seize the moment and become enlivened again by offering small solo, orchestral or choral engagements or even music lessons. Just as the resident families surely played and heard music in Tarrytown, New York’s Lyndhurst, today visitors to the site can enjoy concerts in the grand picture gallery. Other sites with expansive grounds utilize their landscapes to stage outdoor concerts—a veritable festival of sound, set in stunning places, awakening the imagination of its listeners, transporting them to a different time, a different space.

Other sounds can be experienced in other ways at historic sites. At the Jane Addams Hull-House Museum in Chicago, staff installed Sounds like History into a first-floor space to bring to life the narrative of the site, as well as to evoke a sense of a late 19th-century urban experience. This “sonic landscape” invited guests to imagine a serious yet raucous time gone by, with the infusion of the space with archival recordings mingled with contemporary recordings of sound effects drawn from literary descriptions of the period. Drawing the heavy drape across the doorway and ensconcing ourselves in this room, we heard sounds emerging in children’s voices, shoes rushing across wooden floors, clanging streetcars, clacking typewriters, and whirring sewing machines, and we were transported back to an auditory distance in time, with the sounds of that space remaining with us even today.

Just as the Hull House reflects rising voices, The Forty Acres in Delano, California, still holds the clarion call of César Chavez and the United Farm Workers repeatedly chanting “Huelga!” as part of the Chicano Movement was born there, amidst the decision to strike against the area’s grape growers. Chavez, who recognized the power of words, also knew the power of the sound of silence, enduring a hunger strike in this same place as well. Certainly another sense may have emerged for Chavez during his fast, the sense of smell, perhaps as his mind focused on social justice and the scent of freshly tilled earth and fresh air, and the odor of rotting fruit and sweat pouring down the backs and brows of so many generations before him.
Our experiences and thoughts influence our perceptions when we view such sites as New Mexico’s Acoma Pueblo and the Basilica Cistern in Istanbul.

PHOTOS BY JUAN R. RIOS

SMELL

It is well known that an aroma can evoke profound sensations and memories. This direct connection of scent and memory has become known as the “Proust Phenomenon,” after the French writer Marcel Proust who, in his novel À la Recherché du Temps Perdu, describes a character vividly recalling long-forgotten memories from his childhood after smelling a tea-soaked madeleine. Who among us is not transported to an earlier time or another place when we are near children coloring with crayons from a newly opened box, when we approach the ocean shore with its salt-filled air, or cook over a musky smoke-infused fire pit? Smell is nearly mystical—and we each have our own aromatic memories, layered and connected to one another, linking and moving us from one thought, one feeling, one story, to the next.

Helen Keller wrote in her 1908 book, The World I Live In, “smell is a potent wizard that transports us across thousands of miles and all the years we have lived.” One is certainly transported away walking into almost any ancient site in places such as Mexico, where ancient itself holds a smell; although amazing for what can be seen, the smell of burning copal seemingly collapses time and space when one is standing at the base of Mexico’s grand ancient city of Teotihuacán. All historic sites hold smell though, and in those smells are the magic of memory about which Keller wrote, in such disparate places as the Old Jarrahdale Sawmill in Western Australia, as the sawdust from ancient lumber pulled and hewn through glinting, giant saws fills the air; or at Asilomar in California with its salty ocean breezes and the oiled cypress lodge.
Memorable as scented experiences at historic sites can be, we must interrogate the fact that places also hold heartbreaking smells, reflecting the fragile human condition, and the entire, layered story of the place requires remembering all memories, whole. Rudyard Kipling acknowledged the connection between scent and pain in his late 19th-century poem “Lichtenberg,” lamenting that “smells are surer than sights and sounds to make your heart-strings crack.”

Think, for example, of the United States Holocaust Memorial Museum and the 4,000 pairs of victims’ shoes in its permanent exhibition, and the nearly overpowering sense of despair and trauma one feels, in part emanating from the scent of leather permeating the air. The anguish of the Holocaust is captured in this small but incredibly effective way, and all who experience that anguish at the museum can recall the feeling and story immediately.

Contrasting the smell of horror, other places of memory are purposefully incorporating beautiful smells into their experiences. Stepping into Dennis Severs’ House in London’s East End, one is immediately struck by the rather unexpected scent of oranges. Entering the dining room, the fruity aroma, mixed with other smells, is even stronger, as a nearly empty punch bowl with orange rinds afloat, wine goblets overturned, red wine spilled onto the linen, and half-eaten dinner rolls with breadcrumbs scattered about convey the ending to a lively dinner. And wondrously, rather than focusing on a singular piece of furniture or an architectural element, what visitors most perceive is the sensation that somehow they had truly been a part of the life of that place during that time—explained, at least in part, by the intense engagement of the sense of smell through citrus.

**TASTE**

Taste undeniably reflects an experiential and emotive intimacy unlike any other sense. The heights of taste can be profoundly ascendant—the grapes, currants and spices that have blended and sat with time itself to produce a perfect glass of wine, sipped slowly; a sensuous feast of lamb and corn, blended with finely roasted green chile, peeled, prepared, and seasoned with the always-essential garlic and salt, and cooked for hours in a New
Mexican horno; silky smooth oysters, presenting a heady mix of clean brine and subtle sweet minerals; or refreshing iced tea from blended Luzianne leaves and sugar sweetened from the cane, all infused by the sun, quenching a thirst. All of these flavors, and an infinite number more, leave indelible imprints in our mind.

Anthropologists have long recognized how important taste is to culture and society, seen repeatedly in the prominence of food and drink in rites of passage, in holiday observances, and in daily routines. A bride and groom may never forget the first forkful of wedding cake, the smooth, moist and sugary flavors touching excited or nervous taste buds; the succulent flavor of a holiday turkey, mixed with cranberries and potatoes; or simply the first cup of steaming coffee to greet the sun and start the day with a flavor that originates in Brazil, Ethiopia, Kenya or Indonesia. In this same way then, historic sites can utilize the sense of taste, so layered and complex, to make or evoke a memory connected with a place.

At historic sites, twilight picnics on the grounds, al fresco farm dinners on long tables with crisp white tablecloths set in the middle of a field, or cocktails on a piazza looking out to a majestic mountain offer experiences that tie to the layers of places of memory. Historic sites are also highlighting the talents of creative chefs, with collections and other attributes of the place providing inspiration for unexpected and unforgettable culinary experiences.

Returned to its core story, today Albuquerque’s Los Poblanos Historic Inn and Organic Farm has perfected the use of taste infused into a site. A feeling of relaxation permeates every corner, every moment, of that truly magical place, including candlelit evenings seated on the loggia, savoring meals of freshly harvested and specially prepared foods to create breathtaking, never-to-be-forgotten connections to place.

TOUCH
As the first sense to form in a developing embryo, touch is necessary for an infant to thrive. It is also what blankets us naturally—a balmy breeze, oppressive humidity, or frigid, biting cold. Our flesh perceives the tangible qualities of the universe, enabling everyday movements and the heightened sensations of pain and pleasure. Grasping, holding,
feeling something affirms a center of gravity and a process to encounter a tangible world. Consider how almost nothing can replace the intimacy of a kiss; holding your baby for the first time; straining to finish a long run; squeezing soft, cool, wet clay between your toes; or warming yourself by a blazing hearth. Touch provides a way to know our world, and its relationship to place is fundamental.

Yet touch is the least utilized or engaged sense at historic sites. No matter that these places once were constantly being touched—landscapes were traversed by the indigenous and the occupiers; floors were paced by the wealthy and the enslaved, or played upon by siblings; kitchen counters were chopped upon by cooks; walls were first plastered by skilled artisans and then later scrubbed by servants.

Today, while the proverbial velvet ropes have been taken down at many historic places, most still do not permit guests to trace delicate wood moldings with their fingers to imagine what hands carved such intricacies; nor do they place an artifact such as a book in a visitor’s lap, enabling them to experience the smoothness of a leather binding; or slowly lead walks through a landscape to consider the laborer who purposefully turned the soil to plant a rose bush. How curious, since all who touched these places previously layered onto them the rich patina of life, and to stop that most ancient of needs now—touching to truly feel, creating tactile imagery—precludes making deep connections and lasting memories. Certainly stewardship must involve thoughtful caretaking, ensuring measures for the protection of what is precious, the truly irreplaceable. However, by creating the time and space for visitors to make direct touch contact at places of memory—both in the built environment and the open spaces—the likelihood of intensifying and strengthening the understanding and relationship to place increases.

Rising up in the pulpit at the African Meeting House in Boston is an overwhelming experience when one considers the shoes of the giants of social justice who had also once stood on those wide-planked floors, their fingers touching, as ours did, the wood railing and podium. Soberly wrapping our hands around the cool steel railing of the Edmund Pettus Bridge in Selma, Alabama, we thought of the violence endured by the marchers on Bloody
Sunday, now nearly 50 years ago, and left chastened yet more determined than ever to never forget. Whether holding something as singular as a piece of Maria Martinez blackware or an engraved Tiffany silver letter opener, or simply pressing our faces against old wavy and rattling window glass as a train races by or picking strawberries at an experimental farm, there are nearly endless opportunities to touch—and remember, experience, comprehend—the core stories embedded at places of history.

Noting the relationship between touch and body, Aristotle also called attention to the “arts of making,” citing especially house-building and carpentry, as well as sculpting, by which humans transform clay or stone or metal into utility and art, certainly for practical use, but also for the sake of beauty and to stimulate interest or pleasure. Historic sites are ideal places to practice “arts of making.” They can encourage touch through the building crafts, such as by hosting hands-on training programs in wood restoration, delft tile setting, or window glazing. They can also offer cooking classes in a kitchen, teach creative writing in a family library, oversee sketching in a drafting room, set up a potter’s wheel for students’ use in a studio. So many activities that once occurred every day at historic sites could take place again, and the experiential learning and growing that will arouse curiosity and instill a deeper understanding and connection to place will permit everyone to feel more, through touch.

CONCLUSION

The human soul is a magnificent thing, in part made so and nourished by sensing the world in which we live—a place of places. Seeing, smelling, hearing, tasting and touching largely define why places matter. Though in this writing we have reflected somewhat separately on each of the distinct senses, none of our senses truly operates in isolation from the others; they are a convergence of streams, one affecting the other, connecting sensation to the promise of a heightened understanding and consciousness.

Artist Kara Walker’s most recent installation is an extraordinary example of using the senses to engage history toward a heightened
A Subtlety or the Marvelous Sugar Baby, an Homage to the unpaid and overworked Artisans who have refined our Sweet tastes from the cane fields and Kitchens of the New World is a monumental sculpture that has been described as a confluence of engagement with the senses. It compels us to consider the medium of sugar that the artist shaped into a mammy-sphinx as a metaphor and in response to how that crystalline substance and the symbol of the mammy both figure so powerfully in the narrative of slavery and labor. In this installation Walker consciously engages the tensions underlying history; the industrial processes of refining sugar—pressuring it and converting it from brown to white—that for her becomes emblematic of the larger discourse on race. Here, the artist pushes and pulls us to consider place (cane fields and kitchens) and story (mammy and labor) by interrogating the substance of sugar and revealing that in it lies the possibility of understanding, of wisdom. “Sugar,” as Walker has written, “crystallizes something in our American Soul.”

Similarly, what if plantation sites worked as a collective and with artists to design other sensory installations. Henry Miller’s 1939 travel journal, The Air-Conditioned Nightmare, could provide an interesting impetus and framework. He observed that “the great houses followed the great crops: in Virginia tobacco, in South Carolina rice, in Mississippi cotton, in Louisiana sugar”? By using rice, tobacco, sugar, and cotton as the materials at these “great houses” for programmatic engagement, this juxtaposition could result in an elevated critical discourse at these sites to forefront all of the layers of place and history.

Could an even deeper understanding of place and history be experienced through our senses? While the classification of five distinct senses is widely attributed first to Aristotle, it is widely believed today that there are actually hundreds more: a sense of timing, a sense of balance, a sense of hunger and thirst, and perhaps countless others. There may also be a sixth sense, a feeling of what is intangible, one that is about inner knowing, inner feeling; it evokes a depth of unconsciousness.

While Aristotle may have focused on five senses, it is widely believed today that there are actually hundreds more: a sense of
timing, a sense of balance, a sense of hunger and thirst, and perhaps countless others. There may also be a sixth sense, a feeling of what is intangible, one that is about inner knowing, inner feeling; it evokes a depth of unconsciousness.

Muscogee poet Joy Harjo, recognizing the power of the mind and its connection to the senses, broadens the discussion even further: “My understanding is that we have three minds, yet they make one continuum. One takes care of everyday details, is linear; it’s the organizer. It takes information directly from the five senses. The second is the gut-heart mind, or fekce. It’s the mind of memory, the carrier of the ancestral knowledge. It is the knowing mind. The third is the intuitive, the beyond-human-knowing mind. It doesn’t know time and space. It is beyond time and space. It is the compassionate mind. All things make sense here.”

The second and third minds suggested by Harjo may indeed reflect a sixth sense. In both cases, the power of place is perhaps, as it is for the five traditional senses, a platform for a deeper engagement and awakening.

The very idea of a “mind of memory” is about something imprinted in the depths of or beneath consciousness—individual, collective, and ancestral. It can emerge from a remembrance of childhood as much as it can from a genetic impression. Often this knowing comes from dreams, flashes in the day and night about someone, some time, or some place. At other times, it is simply a clear and obvious presence and thought when we arrive, stand, and feel that place. While the stories of a place may certainly be concealed within official documents, maps or census records, they are also intricately woven within place names, songs and prayers. They are felt in those moments when someone arrives at the foot of a mountain, or the edge of the ocean, and though they have never been there before, recognize it. How else to explain but by our sixth when we look at an ancient ruin and sense a home full of laughter and tears, or as we sit amid a clearing in the forest surrounded by headstones and feel our ancestors.

The intuitive mind is about a feeling-thinking sensibility. Knowing what happened at a place, there—sitting in the pews of the 16th Street Baptist Church in Birmingham, Alabama, or standing at the edge of the Wounded Knee Massacre site in the Lakota Pine Ridge
Indian Reservation in South Dakota—can immediately provoke a range of emotions, even if we are not personally or culturally connected. For many people, sites like these hold not only images of the past but of the self—individual and communal, a deep awareness—as well as what Karl Jung described as the collective unconsciousness.

Beyond what is imagined, represented and experienced, perception of place is inevitably elevated through an engagement with our senses. We see, hear, touch, taste and smell, but we also feel and think, therefore we are human. From the pinnacle of observation, through the incredible medium that are our senses, the appreciation and understanding of the world around us, including places of memory, only grows stronger. FJ

Standing on the wide-planked floors at the African Meeting House in Boston brings to mind the giants of social justice who once stood there.

PHOTO COURTESY OF THE MUSEUM OF AFRICAN AMERICAN HISTORY/SHAWMUT DESIGN & CONSTRUCTION

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When Buildings and Landscapes Are the Collection

TOM MAYES AND KATHERINE MALONE-FRANCE

Most historic sites and house museums currently follow museum collections standards that do not generally acknowledge that their buildings and grounds often represent the most important and tangible “objects” in their “collection.” In this context, institutions struggle with balancing their stewardship of the museum objects they hold with their stewardship of the buildings and grounds they are also charged with protecting and interpreting. Recently the National Trust spearheaded an effort to reconcile these long-standing conflicts by modeling a new approach—one that treats the historic structures and landscapes, and the object collections, as being the same type of resource. This approach places the historic buildings and landscapes on a par with the museum collections objects and recognizes the interconnected stewardship and interpretation of all three elements. It also reflects both the preservation mission of the National Trust and the realities of, and best practices in, stewardship of its historic sites.

THE CHALLENGE

When museum objects and the historic real estate are treated as completely separate types of resources, conflicts between the care of objects, on one hand, and the care of the buildings and grounds, on the other, are

At Drayton Hall in South Carolina, it is clear that the near-original Georgian building, with its exquisitely crafted interiors, and the landscape that preserves layers of historical development are a major part of the collection. Although Drayton Hall does steward a collection of furnishings, decorative arts and archives related to the site, no furnishings are on display in the home itself.
inevitable and can be detrimental to the long-term stewardship of all of these resources. For example, while the installation of an HVAC system might be viewed as necessary for climate control to protect the objects, it may have direct and negative consequences for the architectural and material integrity of the house. Similarly, efforts to use the collection to actively interpret the site may endanger the collection. Staff trained in traditional collections management may apply very distinct standards and use different approaches to stewardship than would staff charged with preserving and managing the buildings and grounds.

One of the most controversial questions raised by these differences is this: If funds have been raised through deaccessioning and selling collections objects, may these funds be used to care for the buildings and landscapes?

At the Historic Sites of the National Trust, the buildings and landscapes are interpreted to the public as much as, if not more than, the object collections. For example, at Lyndhurst, a National Trust property in Tarrytown, New York, the Gothic-revival mansion, designed by mid-19th-century architect A.J. Davis, is the principal artifact that visitors come to see. Yet the mansion is inseparable from its setting on the Hudson River and the site’s landscape, which exemplifies mid-19th-century design. Inside the mansion, the collection includes furniture designed by A.J. Davis specifically for

At Lyndhurst in Tarrytown, New York, it makes sense to consider the mansion and its contents as one unified “collection” of Gothic-revival architecture and design.
the property and objects associated with the families that lived at Lyndhurst over time, but there are also architectural details that are works of art in their own right. All of these different elements are actively interpreted to the public—individually and as a composition—and all are of equal importance in understanding the site.

**USING EXISTING STANDARDS AS A GUIDE**

In considering a new approach, the primary issue to be addressed was how the ethical standards governing collections management should be applied to the treatment of historic buildings and landscapes when they are part of the museum collections. The National Trust’s investigation of this matter resulted in a white paper entitled *Expanding the Collection to Include Historic Structures and Landscapes* that examines current standards and practices established by the [American Association for State and Local History (AASLH)](https://www.aaslh.org) and the [American Alliance of Museums (AAM)](https://www.aam-us.org).

For those who aren’t familiar with these ethical standards—or don’t track them on a regular basis—the central and most controversial issue is whether it is ethical to use the proceeds from the sale of objects from the object collection to fund the conservation and care
of the buildings and landscapes. The standards have traditionally held that when a collections object is removed from a public institution, the funds from its sale should be used for something else of public benefit related to the object collection—such as acquiring another object or caring for another object. This is intended to ensure that comparable public benefit is provided when an object is removed from the collection and that the institution doesn’t treat the collection as a source of operating funds.

Stewards of historic sites have long taken the position that funds from the sale of objects could be used either for the acquisition of new collections objects or for the care of existing objects. However, in spite of the public benefit afforded by their building and landscapes, most site stewards have not felt comfortable using the funds resulting from the sale of objects for the care of buildings and landscapes, even when the building or landscape was the primary artifact interpreted to the public.

**A CAUTIOUS BUT MORE EXPANSIVE POLICY**

In *Expanding the Collection to Include Historic Structures and Landscapes*, the National Trust reaches the conclusion that the use of museum deaccessioning funds for the care of buildings and grounds is within the ethical standards if the buildings and grounds are held for and interpreted to the public. It qualifies this policy by further stating the need for establishing appropriate protections to ensure that collections are not “cherry-picked” to provide operating funds for the site.

*Expanding the Collection* is the outcome of a deliberative process undertaken by the National Trust over the past two years.
as a part of the organization’s strategic priority of re-imagining historic sites for the 21st century. In addition to discussions with National Trust staff and site directors, the proposed changes to the collections policy and the rationale for them were explored in sessions at the 2013 AAM and AASLH conferences and in invited presentations to the AAM Accreditation Commission and to the AASLH Standards and Ethics Committee. The National Trust Board of Trustees approved the revised Collections Management Policy to implement these changes in June 2014.

AASLH commended the work of the National Trust, stating “We applaud the thorough, open and thoughtful approach the NTHP has taken in its consideration of this policy change. Given its national stature, the National Trust is well aware that many organizations look to it as a source of best practices in the area of care and interpretation of collections, historical structures, and significant landscapes.”

AASLH suggested four specific practices or provisions that should guide implementation of these new standards, including:

1) Not all structures or landscapes should be designated as collections. This distinction should be reserved for structures or landscapes with sufficient significance that are also held and used for the public good.

2) There needs to be a clearly stated distinction between routine maintenance and conservation and restoration of unique and significant features of a structure or landscape to minimize the temptation to use funds for more routine though perhaps deferred or critical maintenance.

3) All use of funds from deaccession must be in keeping with existing federal, state, and local laws and recognized accounting practices.

4) Institutions must establish, maintain, and implement policies that keep the act of deaccessioning clearly distinct from the act of using the funds.

These provisions either have been or will be incorporated into the National Trust’s policy and practices. The National Trust also plans to share the process of implementation of the new policy changes with the historic site and historic house museum community.
While the National Trust position in *Expanding the Collection* comes in the wake of recent high-profile controversies over the sale or transfer of collections at institutions including the Corcoran Gallery of Art, the Detroit Institute of Arts, the Delaware Museum of Art, and Randolph College in Lynchburg, Virginia, it has been met with relatively little controversy—in part because it carefully notes the distinctions between different types of institutions (fine arts and educational institutions versus historic sites and house museums), and is based on the fundamental principle of public benefit. FJ

THOMPSON M. MAYES is deputy general counsel, and Katherine Malone-France is director of Outreach, Education, and Support at the National Trust for Historic Preservation. Their [blog post](#) on this topic appeared in the Preservation Forum Leadership blog in June 2013.

**TAKEAWAY**

Click here for *Expanding the Collection to Include Historic Structures and Landscapes*.

**TAKEAWAY**

Click here for the National Trust for Historic Preservation Collections Management Policy.
Innovation at National Trust Historic Sites

CINDI MALINICK

Even before Richard Moe’s groundbreaking essay “Are there too many house museums?” historic sites stewards and preservation professionals had begun questioning the relevance, role and long-term sustainability of historic sites. By 2012 exploring that question became an imperative, and the National Trust embarked on an ambitious program, supported with a multiyear Innovation Lab for Museums grant from EmcArts, to incubate new approaches at its own sites. The goal was to find ways to move from the traditional house museum model (static objects, contrived period rooms, guided tours) to a visitor experience that better informs, illuminates and inspires. As conceived, the re-imagined historic house museum would engage the senses beyond sight to include sound, smell, touch, taste and even sentiment. It would welcome user-generated content and foster new collaborations. It would use architecture, collections and landscapes to tell a broader range of stories that reflect the diversity of American history. It would serve as a living laboratory for conservation, creativity and scholarship. It would seek to address tensions and difficult issues based in the realities of its past. It would be economically sustainable.

The Innovation Lab project provided the platform for exploring and launching this new approach. The grant funded several key activities including joint brainstorming sessions and diverse “prototype” projects conducted by individual National Trust sites. Crucially, it enabled a core team to meet to develop a charter with specific principles that will guide future work:

- Historic sites are managed adaptively to be financially sustainable.
- Historic sites listen to and respond to their communities.
- Historic sites are dynamic, relevant and evolving.
- Historic sites foster an understanding and appreciation of history and culture that is critical, layered and sensory.
Historic sites serve as spaces for reflection, conversation and as a nexus for storytelling.

Historic sites are inclusive and reveal the full breadth, depth, and often marginalized scope of American history.

But what does innovation really look like? Following are several examples that provide evidence of National Trust Historic Sites’ growing “innovation muscles.”

**EXPERIMENTAL EXHIBITION AT CHESTERWOOD**

It’s always a challenge for a historic house museum to stay fresh and relevant for visitors. At Chesterwood, the country home, studio and gardens of renowned sculptor Daniel Chester French, located in Stockbridge, Massachusetts, the *Innovation Lab* grant supported creative exhibit installations that added new layers of information and insight. These were produced by artist Rebecca Keller, who has created exhibit installations at historic sites around the world. Her work explores the intersection between the arts and the layers of stories embedded in those sites—all to “do history better” and to engage and connect with visitors in unexpected but important ways.

Beyond conducting historical research about French and his home, Keller employed the eye of an artist and poet to look for themes and metaphors suggested by the facts and the setting. Some of the unifying themes and tropes in Keller’s installations are French’s connection to notable figures in American arts and letters; images of veiling and unveiling in French’s art; his use of allegory; flight; notions of nature as a path to the sublime; and his sculptural methods as both metaphor and artistic process. Supplementing the existing room displays, Keller expressed these themes by introducing additional objects and graphics, such as “calling cards” of significant people who associated with French and stacks of books showing his diverse interests; a fabric-art display of wings; quotations in French’s handwriting on the topics of nature, beauty, and transcendentalism; and work-in-progress sketches and sculptural pieces. The installation project was well received by the public and local media, inviting the possibility of more creative efforts to interpret other themes at the house.
CULTURAL PROGRAMMING AT THE PHILIP JOHNSON GLASS HOUSE

With exterior walls composed almost entirely of glass, the Philip Johnson Glass House in New Canaan, Connecticut, is one of the most unusual living spaces visitors may ever see. But can the creativity of the past be connected to that of the present and future? Along with continuing to provide tours of this unique property, the stewards of this National Trust Historic Site have begun using it as a venue for cultural programming offered in the spirit of experimentation and innovation that inspired Johnson’s design.

For two weeks last fall, New York-based artist Alex Schweder participated in the cultural life at the site while occupying a mobile living unit (combining a van, a scissor lift, and an inflatable room) temporarily situated alongside the Brick House. While in residence, Schweder attended Glass House public programs, engaged with visitors and site guides, and worked on a book manuscript about “performance architecture” in Philip Johnson’s library. As a recent article notes, “Mobile Living Unit” set the stage for an ongoing artist-in-residence program at the Glass House. Also see Van Parks, Bubble Emerges, Man Inside.

REVEALING LAYERS OF PERSONAL HISTORY AT BELLE GROVE AND OATLANDS

Interpreters of historic sites often grapple with how to reveal the forgotten or little-known stories of the ordinary people who lived in, worked at, or passed through a place. All sites will have layers and layers of such history, laid down through generations. At Belle Grove and Oatlands, two National Trust Historic Sites located in the
Shenandoah Valley of Virginia and Leesburg, Virginia, respectively, staff found an engaging and directly personal way to bring such history to light, by photographing and researching signatures in either hidden or unexpected spaces.

At Belle Grove, signatures on the walls in the attic—a little-used space only accessible up a tightly winding staircase—had long intrigued staff members, who believe that this tradition of “graffiti” began with Union soldiers who occupied the house during the Civil War. The signing of the walls continued into the 19th and 20th centuries. Belle Grove staff documented this graffiti through photography and videography. There are about 400 names, but also doodles, poetry, and even love notes; the Historic American Building Survey (HABS) surveyors also signed their names in the 1970s!

Staff at Oatlands undertook a similar project to document signatures found on the walls of its Garden Shed. The site now has high-resolution images of each of the signatures, as well as initial research on some of the earliest signatures. The project, with both images and accompanying stories, is now included on the Oatlands’ website, as a beginning for public dissemination and engagement. A recent article covers the project, and especially focuses on the signatures’ connections to some of the enslaved men and women who lived and worked at the site.
TELLING THE STORY OF TELLING THE STORY: GRAPHICS FACILITATION TO DESCRIBE THE WORK PERFORMED AT PRESIDENT LINCOLN’S COTTAGE

President Lincoln’s Cottage used *Innovation Lab* grant funds to begin re-imagining how the site tells the story of its work, starting with the orientation video, which sets the tone for the entire site experience for visitors, but also serves as a “summary” for any donor or prospective donor being introduced to the site. The site staff hired a well-known graphics facilitator firm, Crowley & Co., to lead them in initial exercises. One surprise outcome of the project came during a “History Timeline” activity during which staff discussed the past 18 months’ work, culminating in a wall-length visual representation (photo above). The sheer volume of notable milestones and other events was staggering, revealing to the site staff how important it is to have time to reflect after such a prolific period; further, staff members concluded that if even they were not aware of how much work had been accomplished over the past year and a half, supporters and other key stakeholders probably did not fully appreciate it either. This realization led to a new next step—to create a timeline, as well as visual representations, of the new phase President Lincoln’s Cottage is about to enter.
RESEARCHING POTENTIAL OPERATIONAL AND PROGRAMMING CHANGES FOR FARNSWORTH HOUSE

How can a place fixed in history inspire and enable new generations to address modern-day social needs? To help explore this, the executive director of **Farnsworth House**—the Mies Van de Rohe–designed home near Plano, Illinois, that is an icon of modernism—traveled to the **Rural Studio** in Newbern, Alabama, to learn about its operations and programs. The architecture school of Auburn University founded and has been operating the Studio for 20 years in Newbern, in what is in one of the most economically disadvantaged counties in the United States. The purpose of the Studio is to provide architecture students with real-world opportunities to design and build housing and community spaces for an underserved population, as well as to research more efficient, economical and environmentally sustainable building techniques. Like the Farnsworth House, the Rural Studio uses minimalist design and construction techniques, and operates within in a rural setting.

The executive director of Farnsworth House took note of some of the key guiding principles of the Studio that have made it successful: its clear mission with strong elements of social service and environmental consciousness; its long-term commitment to and engagement with a specific underserved community; its work to provide not only basic shelter, but also civic, social and recreational amenities that enhance quality of life; and its opportunities for students to improve the lives of others while also making significant contributions to the profession regarding building efficiencies and sustainability.

The major lesson for Farnsworth that the site’s executive director took away from his visit to the Rural Studio is that, rather than trying to replicate the Studio’s specific programs, it is important to understand why and how it has become successful as he and his staff consider what might be an appropriate program to introduce at Farnsworth.

A CULTURAL SHIFT ACROSS THE SITES

The **Innovation Lab** experience has engendered an eagerness among staff to continue experimenting and taking risks, realizing
that innovation is as dependent upon incremental changes that work
toward tipping points as it is on large, wholesale transformations,
if not more. The framework and language of innovation—and, frankly,
a changed culture—have given the staff permission to take risks,
make mistakes, adjust, and, if necessary, repeat, until momentum
is steadily built. This changed culture has resulted in thinking
differently, moving past assumptions about stakeholders, audiences,
programming, revenue, and infrastructure, and finding ways to
leverage all of these toward a common goal. The National Trust will
continue to draw upon the momentum of the Innovation Lab by
investing, even in large and small ways, in creatively rethinking and
transforming operations and programs. FJ

CINDI MALINICK is the Louise B. Potter senior director of Site Stewardship at the National Trust for Historic Preservation.

TAKEAWAY
Read more about the National Trust Historic Sites Innovation Lab for Museums in the Final Report prepared for EmcArts.
Finding Our Compass: Lessons in Planning from National Trust Historic Sites

SUZANNE B. LAPORTE, WITH NATIONAL TRUST STAFF AND COMPASS VOLUNTEERS

S tewards of historic sites including the National Trust may excel at preservation, collections management and interpretation, but they rarely excel at the business of running historic sites. Enter Compass, a nonprofit organization based in Washington, D.C., that engages professionals from a variety of areas, including alumni from the nation’s top business schools; employees of consulting firms such as McKinsey and Booz Allen Hamilton; and lawyers, consultants and others to provide pro bono strategic business consulting to nonprofits in the greater Washington, D.C., and greater Philadelphia areas. Since 2010 Compass has worked with the National Trust and some of its sites on board development, governance, fundraising, planning, partnerships, program collaborations, mergers, and marketing. By promoting smart business practices and strategic planning, Compass has helped the National Trust ensure long-term sustainability at many of its cherished historic sites.

OATLANDS: MAKING DEVELOPMENT A PRIORITY

Oatlands (1798), a National Trust Historic Site and National Historic Landmark in Leesburg, Virginia, operated as a grain and wool-producing plantation whose success depended completely on a slave economy. Bequeathed to the National Trust in 1965, it opened the following year to the public as a historic, cultural and recreational site. Since then, it has become increasingly important as a year-round open-space refuge in fast-growing Loudoun County.

In 2009 Oatlands’ stewards ambitiously developed a strategic plan that required significant additional operating funds, while also proposing major restoration projects on the 1821 barn and 1810 greenhouse (the second oldest greenhouse in the country). As the board and staff began confronting the financial challenges the
strategic plan and renovations presented, they reached out to Compass for assistance.

Compass conducted a deep market and profitability analysis of the site’s four principal funding categories: development, admissions, events and gift shop. Compass conducted extensive interviews with various staff and stakeholders and compiled operating and financial data on similar organizations. It became clear early on that Oatlands would benefit the most by focusing on development, where there was untapped potential that could lead to significant gains.

The Compass team’s final report for Oatlands included numerous recommendations, particularly around building a stronger donor base and realigning the site’s four funding categories. Other suggestions included increasing revenue from special events by addressing the lack of a permanent covered facility and making upgrades to the poorly performing gift shop. The site is implementing these recommendations by installing a party pavilion with a semi-permanent frame tent on a concrete base and by adjusting shop inventory.

According to the Compass team’s project leader, Jennifer Blasko, “The team explained that sometimes an income stream may serve a strategic purpose and therefore it is acceptable for it not to be profitable. However, it is important to define the net contribution of each of the streams and plan accordingly.”
Interestingly, a notable cultural change at the site occurred after the Compass project concluded, but it was directly tied to the project. A new executive director worked to realign the board and recruit members with new skills to address the urgent need to work toward financial sustainability, a key theme of the Compass work.

**PRESIDENT LINCOLN’S COTTAGE**

**Round 1: Strengthening the Core**

*President Lincoln’s Cottage* (PLC) was Lincoln’s preferred summer residence during the most crucial years of the Civil War. Located several miles north of the White House on the grounds of the Soldiers’ Home, a retirement home for veterans, it provided the Lincoln family with a respite from the heat and humidity of central Washington and the constant distractions that were part of life in the White House. Lincoln spent nearly a quarter of his presidency living at this quiet retreat, where, among other things, he formulated the thoughts on freedom that eventually resulted in the Emancipation Proclamation.

In 2000 the National Trust brought national attention to the Cottage and facilitated the designation of the site by President Clinton as the President Lincoln and Soldiers’ Home National Monument. Eight years later, after extensive restoration, the Trust opened the Cottage and an adjacent Visitors Center to the public.

By 2010 PLC was at a crossroads. General public visitation was declining, and the original strategic plan was out of date. Most significantly, the private foundation that had provided major funding for the site’s start-up expenses, and continued to provide more than 40 percent of its annual budget, signaled it was planning to redirect its support to other projects. PLC staff hoped to replace lost donor revenue with increased earned income, but did not have clear plans for doing so. With PLC’s future at stake, the National Trust turned to Compass for help.

Compass began a two-year Strategic Planning Project for PLC in the fall of 2010. The team began by conducting a “SWOT” (strengths, weaknesses, opportunities, threats) analysis and in-depth stakeholder interviews, developing and distributing a customer
survey, and analyzing financial data. Compass team members also met with executive directors of other historic sites to understand industry trends and evaluate (or “benchmark”) PLC’s operations in relation to best practices at other historic sites.

Though the Compass team had positive things to say about the management of the Cottage, particularly its programming, the team also reported significant weaknesses, including a lack of stakeholder consensus about the underlying mission and target audiences, a small donor base, uncertain long-term funding, minimal brand awareness, and limited prospects for large-scale public visitation due to the Cottage’s relatively remote location. The team noted that the forthcoming sesquicentennials of the Civil War and the signing of the Emancipation Proclamation offered opportunities to raise PLC’s profile, but the looming reduction in donor support and the lack of a capital reserve threatened the site’s ability to weather any disruption to earned income.

The Compass team’s benchmarking provided several insights that apply to nearly all historic sites. Most have insufficient earned income to cover operating expenses, and so the connection between donor development and financial health can be critical. The team also noted the unique and varied qualities and operations of successful sites. What mattered for their success was identifying
a relevant niche that appealed to a significant audience and establishing the organization (or historic site) as a leader in that area.

The Compass team recommended that PLC pursue a strategy of steadily building on what it already did well, rather than hoping to achieve a rapid increase in earned income by trying to remake itself as a high-volume tourist destination. The team believed that PLC could leverage its existing strengths to promote greater brand awareness and more active development efforts, which in turn could help increase income from gifts and grants that would support program expansion and improve long-term financial sustainability.

The PLC staff began to act on these initial findings before the end of the first year of the project. The Compass team assisted in the development of a new mission statement that emphasized engaging the public in the exploration of Lincoln’s ideas on liberty, justice and equality, and their relevance to contemporary issues. In addition, the site’s Advisory Council decided to shift some of its members to a new Scholarly Advisory Group, with the remaining Council members focusing more intently on development.

In the second year of the project, the Compass team divided PLC operations into five mission-related service lines: preservation, public visitation, student education, retail sales, and policy dialogues (a lecture series and temporary issue-specific exhibits), as well as five supporting activities: marketing, governance, management, development, and on-site rentals. Team members then broke into small analytical groups to explore each of these areas in depth and gain a comprehensive understanding of how the site functioned on a day-to-day basis, as well as to propose realistic options for the future. This led to the development of a new vision statement and six strategic goals necessary to achieve the vision.

The Compass team’s final deliverable was the framework for a new strategic plan that stressed significant programmatic growth built upon four pillars:

- Enhancing Mission-Related Programs
- Attaining Sustainable Financial Management
- Achieving Wider National and Local Recognition
- Enhancing Management and Organization
Twelve specific action items, spread across these four pillars, were proposed, including implementation of a financial snapshot report (or “dashboard”) designed by a member of the Compass team, allowing PLC management to test the overall financial impact of different operational choices, changes in staffing responsibilities, and potential partnerships with institutions focused on contemporary emancipation-related issues such as civil rights and human trafficking. The Compass team also provided the PLC staff with examples of how to fill out the strategic plan framework with specific objectives, performance metrics, and a methodology for tracking progress.

PLC’s executive director, Erin Carlson Mast, reflected on the team’s work: “From the start, the expertise of the Compass volunteers provided essential validation, as well as an unbiased perspective for understanding both our real and our perceived challenges. Compass encouraged us to see ourselves in ways that seem obvious now, but did not at the time. One eye-opening moment was when our Compass team likened us to a start-up organization. Our parent organization [the National Trust] had existed for more than six decades, but we had only been open to the public for a little over four years, years that also covered one of our nation’s worst economic downturns. The necessary fluidity of our operation was much more akin to that of a start-up than of a veteran institution. It was an epiphany that explained things we had seen and experienced, but which had not made sense until our operation was assessed through the eyes of our Compass volunteers.”

The PLC staff and Advisory Council have taken several actions to strengthen each of the four “Strategic Pillars,” some based on the Compass team’s proposals and some of their own design. Educational programs continue to be expanded and improved, and include options for distance learning. Development efforts have intensified and an effort to build a capital reserve has made progress. PLC’s public profile was raised as it hosted an exhibit on modern slavery, endorsed by former First Lady Laura Bush, which received media coverage from *Washingtonian* magazine, the Voice of America, and the BBC. The staffing chart was updated, and positions designated solely for marketing and development have been filled. Importantly,
PLC has now adopted a habit of strategic thinking, applying rigorous, objective and data-based analysis to gain a clear-eyed view of its situation and discern a practical way forward.

**Round 2: Governance Model Redesign**

When the executive director of President Lincoln’s Cottage needed expert, unbiased data crunching and analysis to consider a proposed change in its operating model, she approached Compass again for guidance. Stewards of President Lincoln’s Cottage were exploring ways to move away from their traditional operating model with the National Trust. Compass provided a feasibility study that assessed the merits and viability of changing the President Lincoln’s Cottage’s governance structure to achieve greater independence. The study considered the impact of the proposed change on staff and the budget, and what changes would be required in human resources, benefits, insurance, legal agreements, governance, information technology and marketing. The team conducted interviews, reviewed previous analyses and past budget performance, and considered future capital needs.

It then modeled how potential new revenue and costs would compare to current figures. In addition, Compass presented a range of scenarios outlining high and low expenses associated with the potential governance change as well as clear direction on specific fundraising efforts.

The analysis instilled confidence in the staff and Advisory Council of President Lincoln’s Cottage to move forward with the site’s operational model changes.

Of Compass’s work with her site, Erin Mast notes: “I know other nonprofit leaders who have had negative experiences with for-profit consultants who had the perception that organizations are only ‘nonprofit’ because they are doing something wrong. In my experience, Compass holds the opposite viewpoint. They work with nonprofits that they think are doing something right—something great—but that lack the resources to access the kind of expertise that could elevate their work. This partnership with Compass allows nonprofits to have an even greater impact on their communities.”
ROUND 1: ASSESSING A COMPLEX STEWARDSHIP MODEL

As the PLC project was moving forward, the National Trust asked Compass to conduct a similar analysis for its whole portfolio of historic sites. The Trust was contending with complex and multiple operating and governing models, unclear definition of roles and responsibilities, inconsistent policies, and financial challenges at the site level. The Trust asked for clear policies and frameworks for governing for three types of site relationships: stewardship (owned and operated directly by the Trust), co-stewardship (owned by the Trust and operated by another entity), and contract co-stewardship (owned and operated by other organizations). The goal was to ensure protection of the sites’ assets and the use of best practices in operations at all sites, while also affording site councils, boards, and site management staff the ability to provide effective guidance and support at the local level.

Compass engaged a team of volunteer consultants participating in Booz Allen Hamilton’s Leadership Excellence program. The Booz Allen consultants provided the Trust with 1) an analysis of the current governance structures, assets and liabilities; 2) information about governance structures used by comparable organizations from which the National Trust might gain insights; 3) suggestions for a revised template for cooperative agreements and leases with co-stewardship and contract site entities; and 4) recommendations to implement re-envisioned governance policies and procedures that strengthen the Trust’s historic sites and that better capture and promote the Trust’s strategic plan.

Roles of the stewardship sites board members were summarized as being in the nature of advisor, preservationist, fundraiser, and ambassador. These board members contribute strategic thinking and problem solving at the sites, as well as provide access and influence to community leaders, decision-makers and donors. They tend to demonstrate outstanding personal commitment. Co-stewardship board members take on a more traditional governance role because they are responsible for approving budgets, setting multiyear plans, hiring and supervising the executive director,
establishing policies and management systems, ensuring risk management, and creating and maintaining board policy.

The investigation of governance practices and models undertaken by Compass for the National Trust can be replicated for other sites using the following model:

**Assessment**—Assess the current governance structures, assets and liabilities, including advantages and disadvantages in supporting the organization’s strategy;

**Options**—Gather and provide information about governance structures used by comparable organizations from which the organization might gain insights and develop alternate options; and

**Recommendations**—Develop recommendations to implement re-envisioned governance policies and procedures that strengthen the organization and that better capture and promote its strategic plan.

While this model can guide board thinking on governance, it is always helpful to involve outside expertise when possible. Working with a board can be hard and requires ongoing assessment and critical review of the role of board members and staff. A neutral third party can add new perspectives and useful benchmarking information from similar organizations. What’s more, a board will often react more positively to recommendations from unbiased “outsiders” than to suggestions from within its own ranks or the site’s staff.

**Round 2: Transition Planning**

As part of its 2014 strategic visioning, the National Trust affirmed its belief that historic sites with local governance are better positioned to provide strong oversight, connect with the local community, and develop and constantly reassess a sustainable business model to ensure self-sufficiency. With this clear dictate, the National Trust asked Compass to assist in developing a transition plan and documents for its sites to move to co-stewardship, or local governance, status.

The Compass team spent eight months analyzing financial data from a selection of sites, researching traditional nonprofit and museum dashboards, and interviewing site directors. The team found that a traditional dashboard model would not fit the unique transition plans and characteristics of each site, and instead developed a
“transition readiness guide” for National Trust headquarters staff and site directors to use, allowing each site director to assess the site’s readiness and compare the ratings assigned by headquarters staff. This assessment will identify which elements of the transition are furthest along, and where support and expertise from headquarters could be leveraged to expedite the process. The following key questions identified in the readiness guide are helpful for administrators at any historic site as they assess their current status:

Planning and Positioning—Has the local site leadership established a long-term strategic plan? Should they consider other preservation models besides a traditional “house museum” model? Do they properly understand the “essence” of the site and its value to the local community and are they fully capitalizing on it?

Governance—Successful local stewardship requires strong governance. Do the sites have a strong board development plan? A strong board not only cares about how the site is used and preserved, but has overall fiduciary responsibility, which requires a much stronger skill set. Have the board’s bylaws and procedures been established and documented?

Financial Sustainability—Strong financial controls and budget management are paramount for local stewardship to be successful in the long term. Sites must be able to pass independent audits by external accounting firms. A diverse and appropriate set of income streams must be identified, nurtured and updated as needed.

Partnerships—Successful local stewardship requires that sites have strong local partnerships. This process is part of the never-ending task of building support from local organizations, volunteers and donors. Do donors and volunteers have an easy way to get connected and engaged? Is there a strategy in place for recruiting and engaging corporate donors, civic organizations and foundations?

Other deliverables from the Compass team include recommendations for the implementation and maintenance of the evaluation process. According to Compass project leader Michael Kim, “Overall the readiness indicators were designed to help facilitate the dialogue between the sites and the headquarters staff, as well as among the individual site leadership and board.”
**FINDING YOUR COMPASS**

After five years of collaboration and partnership, the National Trust has benefited from the outside business insights of Compass and its volunteers. The Compass teams were able to provide consulting expertise and performed time-consuming research and analysis which have greatly helped the Trust and its sites make critical decisions in the face of a rapidly changing external environment.

Not every historic site or other cultural-based nonprofit has access to a local version of Compass. Other organizations, however, could provide assistance to help site managers develop a strategic mindset and better understand their current position. Local Chambers of Commerce and graduate business schools may be potential sources for volunteers who could help objectively analyze the business prospects of historic sites. So could other national organizations such as Taproot. In addition, volunteers with business backgrounds can often be recruited from local corporations or business schools, and an organization’s board members can assist in identifying volunteers or providing the research and analysis needed to keep their site management staff aware of strengths, weaknesses, opportunities, and threats. FJ

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Written by SUZANNE B. LAPORTE, president, Compass, with LYN HOWELL MORIARITY, administrative director, Historic Sites, National Trust for Historic Preservation, and the following Compass volunteers: DAVID BLACK, director, Performance Technologies, The Advisory Board Company; JENNIFER BLASKO, director, Business Development, Intelsat; MICHAEL KIM, sales capture senior manager, Accenture; EDUARDO KRUMHOLZ, senior associate, Booz Allen Hamilton; AMANDA ROBISON, product manager, Corporate Strategy, The Advisory Board Company; and EMIL SKODON, U.S. Ambassador, retired.
The Period of Significance Is Now

CONTRIBUTORS: ERIN CARLSON MAST, MORRIS J. VOGEI AND LISA LOPEZ

In Washington, D.C., at President Lincoln’s Cottage, students from all over the world gather during summer for a two-day summit to discuss slavery. But not slavery as it existed during Lincoln’s time, slavery as it exists today.

In Chicago at the Jane Addams Hull-House, museum visitors are asked to take part in actions that bring attention to prisoners in solitary confinement and demand that the human rights of prisoners be recognized by lawmakers.

In New York, attendees at a Tenement Talk sponsored by the Lower East Side Tenement Museum hear about current issues of economic inequality from journalist Sasha Abramsky, author of The American Way of Poverty: How the Other Half Still Lives, a gripping book that gives voice to those who have been passed over by the wave of American affluence, and those most recently hit by the economic downturn.

In the Can You Walk Away? exhibit at President Lincoln’s Cottage, disturbing stories that document modern-day slavery in America highlighted the ongoing relevance of Lincoln’s Emancipation Proclamation, which he began formulating here.

PHOTO COURTESY HOWARD + REVIS ©, COURTESY PRESIDENT LINCOLN’S COTTAGE
What is happening here? These events may take place at historic house museums, but they embrace history as it is happening today. The period of significance for these sites is now—not 50 or 150 years ago.

Today, a number of historic house museums have realized that they have a role to play in addressing present-day concerns. They know that the stories they tell about “back then” are still relevant today, and that this history can form a basis for addressing and understanding social justice issues and current events. These museums are playing an innovative role in helping today’s visitors understand that challenges faced by people a century or two centuries ago are still relevant in today’s world.

We interviewed the directors of three sites to find out what is behind these new directions and programming. You will hear from Erin Carlson Mast, executive director of President Lincoln’s Cottage at the Soldiers Home in Washington, D.C.; Morris J. Vogel, president of the Lower East Side Tenement Museum in New York; and Lisa Lopez, interim director at the Jane Addams Hull-House Museum in Chicago.

When you think about the phrase “the period of significance is now,” particularly in terms of the programmatic opportunities, how do you interpret this?

**MAST:** We think of this in two, very specific ways. First, the National Monument designation of President Lincoln’s Cottage highlighted the ideas President Lincoln dealt with here during the Civil War. Those ideas continue to evolve and be focal points in our world today. Second, we are situated in a landscape that has served the same purpose since before Lincoln’s time here, and we interpret this place as living and evolving. This site isn’t frozen in time; it’s part of an unbroken arc of history. Part of the landscape is a national cemetery that is the predecessor of Arlington National Cemetery, and, like Arlington, is still an active cemetery. It has a rolling period of significance, because each burial adds to its history. And the Armed Forces Retirement Home campus continues to serve as a home for retired and disabled veterans. We interpret the evolution of Lincoln’s thinking and the impact of his
VOGEL: History is a conversation that the present holds with the past in order to help chart its course for the future. That’s how I always introduced the discipline in my 30 years of teaching. Done with purpose, preservation, like history, is much more than a mere record of the past or an accounting of what it has left behind. Surviving structures and spaces are gifts; they allow us, in our own time, to summon up the struggles and choices, the truths and values that past generations confronted and drew on in building lives, families and communities. It’s a tremendous opportunity—and responsibility—for the Tenement Museum to interpret this usable past, this guide to the present and the future, in its programs.

LOPEZ: This phrase reminds me that when historic house museums are entirely focused on the past, they can lose sight of their value in contemporary society. Historic houses not only allow visitors to immerse themselves in the past, they also provide interpretation that makes history relevant to our present moment. This is an incredible asset in what is largely a historical culture. Americans love the stories of our collective past, yet the lessons they hold for us can be elusive. Historic house museums have the potential to shed light on our history to yield new insights about the American experience.

At the Jane Addams Hull-House Museum, our staff works to bring past and present into dialogue. For us, “the period of signifi-
cance is now” is not a dismissal of our history; rather it calls us to consider the site’s legacy. We ask: “How do the lives of Jane Addams and other Progressive-era social reformers help us to understand movement-building today?” “What did solidarity look like between Hull-House residents and their working-class immigrant neighbors?” “What do Hull-House’s successes and failures teach us in our contemporary struggles?” This history is an inheritance that we share to enrich the work of those working for social justice today.

How has your programming evolved to address current issues such as human rights, immigration and social justice?

**MAST:** Since opening in 2008, President Lincoln’s Cottage has been focused on the people, events and ideas that resulted in the National Monument designation for this site. We recognized from the start—as did our visitors—that Lincoln was a remarkably modern president. His ideas and his words continue to be evoked by people from all walks of life, all over the world. Here you have a president who continues to draw intense reactions from people. He is hated by some, loved by many. He has been popular among groups as diametrically opposed as capitalists and communists. We have always encouraged visitors to make their own connections and parallels with other points in history. We were reluctant at first to talk about specific issues that were or are the modern successors to ideas Lincoln dealt with in his time, because making one-to-one comparisons can be problematic. We weren’t interested in comparisons so much as showing the evolution of ideas.

Two situations collided to prompt us to deal with current issues more directly. First, the Civil War Sesquicentennial provided an ideal opportunity to look at how our nation had evolved on the
issue of slavery since Lincoln’s Emancipation Proclamation and the 13th Amendment. Second, the issue of modern slavery was gaining more attention in this country, but the breadth and depth of the domestic problem wasn’t well known. It was common for us to hear visitors say, “I’m so glad we don’t have slavery in our country anymore.” Knowing slavery was and is a problem right here in the nation’s capital, 150 years after Lincoln’s Emancipation Proclamation and nearly 150 years after the 13th Amendment, prompted us to finally address the issue here at President Lincoln’s Cottage. It is bad history to imply that slavery ended with the Emancipation Proclamation or the 13th Amendment or any other legal action. Just because something is illegal doesn’t mean it disappears. Rationally we know that, but it wasn’t until we looked at the issue that we recognized there was so little awareness about the prevalence of slavery in our society today. We couldn’t just tell people that slavery has continued, we had to provide more information and empower people to confront these issues.

VOGEL: The Tenement Museum was established to integrate past and present in its programming. That’s not new for us. The museum connected past and present for much of its 26 years by emphasizing social history—that is, the stories of ordinary people and everyday life. Social history continues to figure importantly in the museum’s work; too few cultural institutions appreciate the achievement represented in creating families, educating children, building cities and

The Lower East Side Tenement Museum employs an authentic New York tenement building to present the stories of immigrant families from Europe who settled in such places in the 19th and early 20th centuries. Its newly acquired building, pictured here, will provide an appropriate setting for exploring the experiences of more-recent newcomers from Asia, Latin America and Africa.
planning for better futures. In recent years, the museum has come to focus more deliberately on immigration and identity, past and present, on the ways in which immigrants have continually defined and redefined the nation, shaping who we are and what we value as a people. We have been interpreting the stories of families who arrived on the Lower East Side during the great waves of 19th- and early-20th-century European immigration, and showing how those stories have bearing for today’s immigrations.

We are embarking now on an ambitious new interpretation that will carry the immigration story into the recent past, into the period when the major sources of American immigration shifted away from Europe and to Asia, Latin America and Africa. This new exhibit will let us tell the story of present-day America in the same kind of immersive environments—and with the same interpretive power—that we have devoted to European immigrations.

**LOPEZ:** The Hull-House Museum was historically a site of social justice, with reformers working to achieve rights for immigrants, women and workers; peace; and healthy neighborhoods, so it wasn’t much of a leap to consider how the museum’s programming might consider similar issues today. Our evolution has more to do with a shift in thinking about how museums can affect social change. We have long offered educational programming on contemporary issues, but we are beginning to explore new forms of advocacy and action by positioning the museum as an ally in social movements.
Recently our exhibitions have highlighted contemporary community organizers such as the Chicago Coalition for Household Workers, which is fighting for minimum wage laws to be extended to domestic workers in Illinois. We also have asked museum visitors to take part in actions that bring attention to prisoners in solitary confinement and demand that the human rights of prisoners be recognized by lawmakers. This year we are working with restorative justice groups throughout the city of Chicago to determine what it means to be a peace museum within a city that witnesses upward of 500 murders per year. We believe that our museum can play a role in decreasing the violence in our city. Though our staff may not be the ones working on the ground, we can amplify the voices of those workers and of the youth of color who are bearing the brunt of this violence. We can work to change the conversation about violence so that these youth are not demonized. And we can use our history as a springboard to consider the many methods and histories of peace-building within our city.

The museum staff has long desired for our site to again be at the center of social justice activism in Chicago. The site has always been use by historians interested in movement-building, but the shift to engage artists, activists and policymakers brought new energy to our work. Hull-House was always a site of praxis—the process by which theory is enacted in real situations—and the museum seeks to maintain this commitment to both thinking and action.

Has this programming attracted new audiences?
If so who?

MAST: Our expertise is in history and education. So before developing new exhibits and programs we had to find advisors. We found our other half in Polaris Project, a leading anti–human trafficking NGO based right here in D.C. They provided content and guidance on an exhibit, our largest effort dealing directly with modern slavery in the context of the history of what happened here at the Cottage. The exhibit “Can You Walk Away?” looks at modern slavery in the U.S. 150 years after Lincoln’s Emancipation Proclamation.
We’re also gearing up to host our second-annual Students Opposing Slavery international summit. Last year’s summit brought 35 students from six different countries to President Lincoln’s Cottage. These two efforts along with our other work have led to new partnerships, and new audiences, especially within the modern abolitionist movement. It has become a wonderful symbiotic thing. We can’t be all things to all people, but we can do this in an authentic place and in an authentic way.

**VOGEL:** Audiences have continued to grow as museum capacity has grown, so it’s not clear that there is a direct correlation between program focus and attendance. We do know that word-of-mouth (as revealed in *Trip Advisor* and the like), on which the museum depends on for its marketing, is extremely positive and attuned to program quality and salience. The new exhibit will add further capacity, and it will allow the 50,000 students, most from NYC public schools, who already attend the museum to see an immigration story that resembles their own.

**LOPEZ:** Our programming has attracted audiences that might never have visited the museum otherwise. These include young people, community organizers, and people asking important questions about social justice in Chicago today. We have more work to do in terms of audience cultivation though, as the museum has developed two strong, but largely separate audiences. The museum’s exhibitions mostly attract people interested in Progressive-era history, while the museum’s public programs attract a crowd interested in contemporary social justice issues. Our staff is currently brainstorming how to bring these communities together for meaningful dialogue.

**Any advice for other historic sites looking to expand their period of significance to today?**

**MAST:** There is no clear roadmap to discovering or rediscovering your present-day significance. You might simply stay attuned to your senses, the history, and perennial issues in your community, and one day something will come into focus. Or you could try to sort it out more methodically, by looking at what made your site unique and worth saving in the first place. Then explore how those
themes or ideas are still playing out in your local, regional or larger community today.

VOGEL: Tell important stories that matter to your audiences and to the broader public. Help visitors understand the issues for which they bear responsibility as citizens.

LOPEZ: Consider your site’s unique strengths and determine what community needs that the site can address. The late 1800s home of an industrialist would make an interesting setting for conversations about income disparities today or to examine the role of worker’s unions within the contemporary labor movement. FJ

TAKEAWAY
For work sheet to get you started on rethinking the period of significance for your site, click here.

SLIDESHOW
The Period of Significance Is Now.