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TECHNICAL LEAFLET BUNDLE
A PUBLICATION OF THE AMERICAN ASSOCIATION FOR STATE AND LOCAL HISTORY

Historic House Care and Presentation

BNDL017

This bundle focuses on ensuring that a historic home is furnished, well-maintained, and interpreted in an engaging and appropriate way. Leaflets discuss planning and maintenance, as well as interpretation methods and resources. If you are transitioning from restoration to presentation, or if you are refining and reevaluating your house presentation, this bundle can help.

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TECHNICAL LEAFLET

AMERICAN ASSOCIATION FOR STATE AND LOCAL HISTORY

WOOD FLOOR MANAGEMENT

by Michael W. Purser

INTRODUCTION

When the subject of wood floors comes up in a group of history professionals, it is likely the conversation will center around questions and not answers. Because of several unique factors, wood floors are surfaces that have given history professionals some of their greatest management challenges. These surfaces are often not given the same amount of protection and attention that other surfaces and furnishings receive in historic structures and museums even though many wood floors are currently experiencing a level of use and exposure they never experienced in their original life. Trying to manage these new functions with products old and new and addressing recurring problems can feel like a juggling act.

A contributing factor to this dilemma is the tremendous decline in experienced wood flooring tradespeople as a result of the impact of wall-to-wall carpet on the wood floor industry. A virtual army of experienced tradespeople vanished as the demand for wood floors dropped by 90 percent in the mid-1960s.

As complex as the situation may sound, there is reason for encouragement. A renewed interest in wood, the most popular material ever used for floors, has generated some much needed attention. There is a wider selection of products available today for maintaining wood floors than ever before. Not only has the quality of these products improved but so have the options available for managing wood floors. Finishing and maintenance products can be tailored to meet the specific and special needs of historic structures without compromising their historic characters. Manufacturers are devoting considerably more time and effort to educating the trade on the best methods of using the various products, and the trade is doing a better job of communicating to the public what it might realistically expect from wood floors.

This Technical Leaflet is designed to give history professionals a logical starting place and general directions for exploring the options in answer to questions regarding wood floor management. For many, identifying the problem and seeking direction in resolving it can be the most intimidating aspect of the project. To simplify matters the information has been grouped into four categories: 1) planning and organizing, 2) examining and evaluating the options, 3) establishing priorities for finishing products, and 4) establishing preventive measures to avoid problems.

ORGANIZATION AND PLANNING

To establish a comprehensive and thorough program of wood floor management, a number of questions and issues must be addressed.

DEFINE THE USE OF THE AREAS

Defining the use of the areas is a critical issue that must be resolved. The use and exposure the wood floor received in the past may be entirely different from how it is going to be used in the future. To a large degree, the type of use will dictate what corrective steps should be taken. Today, many historic properties experience much more pedestrian traffic than they experienced in their original use. Also, many properties derive a portion of their revenues from renting or leasing areas for social functions. Ironically, what may spell financial success for a facility—high attendance figures and full bookings on all available rooms—may be the primary factor in a wood floor's deterioration. It is imperative that guidelines be established as to how the areas may be used prior to deciding on a course of action.

INVENTORY ALL AREAS

A thorough examination of all wood floors should be conducted. (All areas should be examined for problems not only with the finish and exposed surface but for structural reasons as well. Floors should be examined free of furniture, rugs, etc.) Problem spots should be recorded and photographed for documentation and easy reference. All products and procedures currently being used on the surface for cleaning or decorative purposes should be listed. Any information, references, or documentation that might indicate similar material used in the past should also be researched and recorded. Wood in areas that might be considered expendable—closets, pantries, storage areas, etc.—should be inventoried for possible future use in replacing or repairing damaged areas.

IDENTIFY THE PROBLEM

Problems with wood floors often follow a typical and predictable scenario. Initially, the floors had an attractive appearance. For one reason or another the visual appeal started to deteriorate and measures were taken to refurbish the look. These may have provided temporary relief, but, after repeated attempts, failed to provide a permanent solution. Out of frustration, other types of products were tried that also brought temporary relief, but their success was short-lived as well. Eventually, it is obvious that the wood floors are no longer being managed and are in a state of deterioration. The objective inappropriately becomes how to manage the layers of accumulated products on top of the wood floor. Instead of attacking the original problem, the *cause* of the deteriorating appearance of the surface, a haphazard and trial-by-failure method has been substituted for a logical approach. Each successive step has compounded the problem. In identifying the core problem, the disease should be treated as well as the symptoms.

DETERMINE PROJECT OBJECTIVES

Objectives should be spelled out prior to selecting a course of action. The focus is justification for the project. Why is the work being considered? What will it accomplish? What can realistically be expected? Answers to these questions will help to establish goals that should lead to productive discussion and exploration. For example: It is not reasonable to expect one product to eliminate the need for a maintenance program in an area subject to extremely high use such as a ballroom or reception area. However, it is reasonable to think that the same area could receive a treatment that will stop any further damage to the wood and leave a surface that can be reasonably and economically maintained.

Setting objectives does not specify who is going to do the project, what products will be used, or when it will be performed. It provides a forum to discuss the practicality and feasibility of the goals, to seek outside and experienced advice, and to determine whether the project is worth pursuing.

STABILIZE THE INTERIOR ENVIRONMENT

Since wood is a porous material, it will readily absorb moisture present in the air. If the moisture is combined with large variations in the interior temperature, the floor's porous surface will experience a constant swelling and shrinking. This movement will cause any number of problems—enlargement and exposure of cracks, destruction of adjacent materials (floor movement of this type can easily crack and fracture stone, plaster, etc.), failure of adhesives holding parquet, etc. Movement of the wood will also accelerate the deterioration of coatings. As coatings age, they often become brittle, and the floor's continued movement will often cause minute fractures. Fractures in the coating will greatly accelerate problems by allowing moisture to pass through to the wood. Stabilizing the interior environment will go a long way in reducing these headaches.

EVALUATE ECONOMICS OF OPTIONS

Initially, short-term cosmetic solutions may be appealing from a cost standpoint, but they rarely offer much in long-term cost reductions. Major restoration may require some impressive initial cost outlay, but it is more likely to offer some attractive long-term advantages. Among other things, with major restoration it is possible to design a more effective maintenance system, and a preventive program can be put in place to reduce most of the problems. One should also consider how the improved appearance of major restoration might increase interest among the public, boost attendance, and create more demand for rental of available space. Many individuals associate dull and lifeless interior surfaces with a state of deterioration and shabbiness, much the same as they would with neglected gardens and landscape. Any steps that would result in increased revenue could be a persuasive argument to trustees and committees for allocating monies necessary for interior work. Consequently, all courses of action should be looked at not only in terms of initial cost but with an eye towards long-term economic goals and objectives.

SAMPLES FOR ANALYSIS

Taking small samples for coatings analysis can pay large dividends. Among other things, analysis will reveal one of the biggest parts of the entire puzzle—the composition and application sequence of materials that have been deposited on the surface of the wood. It should also tell if there are any protective coatings present, and where they might have been worn off. To a large extent, the results of this analysis will lay the groundwork for what actions might be taken. If cosmetic measures can be taken, coatings analysis will determine how the excess accumulations might be effectively and efficiently removed. Granted, there is some expense involved in analysis of coatings, but the possible payback is too great to be ignored.

Coatings analyses are performed by the Society for the Preservation of New England Antiquities and a few similar preservation agencies. (See sidebar explaining procedure.) Resource guides published by organizations such as the National Park Service and the Association for Preservation Technology are useful in locating preservation agencies qualified to analyze coatings.

COURSES OF ACTION

Once the planning stage has been completed, it is time to examine options. Each of the following courses of action will be defined, its objectives described, and its advantages and disadvantages discussed with some reference to their expenses.

COSMETIC PROCEDURES

Defined and described. As the term implies, cosmetic procedures involve the use of products that are almost always restricted to applications taken upon the outermost surface of the wood floor. The primary objective of these procedures and products is to enhance the look of the wood. Contact with the wood is prevented by the presence of some type of protective sealant. Consequently, these products and procedures are rarely intended to affect the wood. Indeed, it is the presence of an underlying sealant that enables most cosmetic products to be used effectively. This sealant provides the necessary foundation upon which the product is applied and then manipulated to create a pleasing look.

Although this description may sound somewhat technical, most individuals would identify cosmetic procedures as one of many forms of general maintenance frequently performed on wood floors. The most popular and familiar example is the use of paste waxes. During the initial finishing process, some type of protective sealant is applied to the wood, followed by the application of paste waxes. In some situations, drying oils (tung, teak, linseed) might be substituted for the wax to achieve a different look. In either case, the purpose of these products is to establish a surface material that:

- can be manipulated for aesthetic purposes.
- is capable of experiencing reapplication of the same or similar materials onto the surface.
- can be removed or taken down to the original sealant without resorting to major sanding and finishing.

CROSS-SECTION ANALYSIS OF HISTORIC FLOOR FINISHES

It only takes a sample the size of a pinhead to identify early finish and paint coatings using a microscope equipped with a fluorescent light source and objectives that magnify up to 250 times.

When viewed under visible light, cross-section samples that contain wood, paint, and varnish layers may often be difficult to interpret because clear finish layers look uniformly brown or tan. Illumination with ultraviolet light provides considerably more information about the layers present in a sample because materials autofluoresce (or glow) with characteristic colors. For example: shellac fluoresces orange when exposed to ultraviolet light while plant resin varnishes (typically amber, copal, sandarac, and mastic) fluoresce bright white.

There are other indicators in a cross-section sample that show a surface has aged, such as cracks extending through finish layers, accumulations of dirt between layers, and diminished fluorescence intensity, especially along the top edge of a surface that has been exposed to light and air for a long period of time.

Fluorescent biological stains, or fluorochromes, applied to a cross-section sample provide the means to identify specific types of binding materials such as oils, hide glues, or gums. These stains can help to distinguish between materials such as oil-bound paint and varnish layers, modern emulsions, casein and tempera paints, and spirit varnishes. The stains also fluoresce in very bright, characteristic colors so the color photographs generated through 35 millimeter photomicrography can provide a clear history of floor finish generations, even up to the application of the waxes and modern acrylic coatings.

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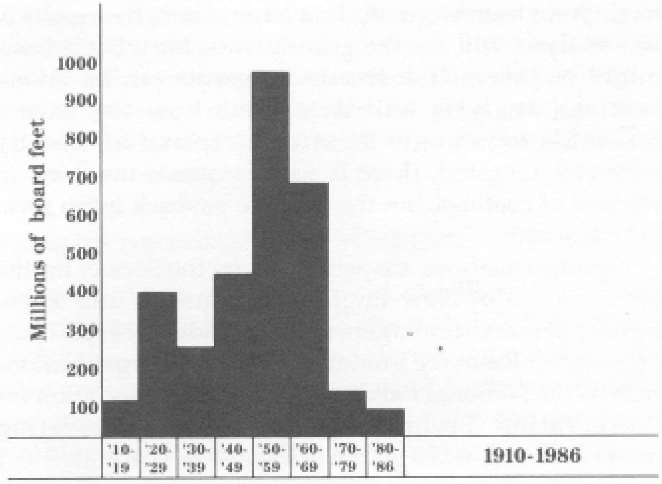
The ability to take off cosmetic products and reveal the original protective sealant is critical. Removal of cosmetic products usually involves chemicals that may be caustic; therefore, it is important that the protective sealant not only be intact but also be able to withstand contact with these chemicals.

Advantages and disadvantages. When used correctly, the advantage of cosmetic products is that they are capable of creating an aesthetically appealing surface. As the surface is used, the look can be restored with a reasonable amount of time, labor, and expense. The primary purpose of these products is to facilitate the restoration of an aesthetic look after the surface has experienced some use. The product should be removed as needed to allow for reapplication. When floors are exposed to routine traffic, the patterns left can be buffed or refurbished rather quickly. This bodes well for areas that receive high amounts of pedestrian traffic. Areas such as ballrooms or galleries that receive traffic in surges often benefit since the area can be attended to with a reasonable amount of time and money.

The disadvantages of cosmetic products and procedures can be many, and they can be very serious. Most of the failures and problems occur for obvious reasons. Some of the more frequent examples include:

- Failure of the sealant. As stated earlier, cosmetic products are used with the intention of enhancing the appearance of the surface, not for providing protection. The sealant used underneath the cosmetic products is the main source for providing protection to the wood. If the sealant is absent or is extensively damaged, the results can be literally catastrophic. In some situations, lack of an adequate sealant means that the cosmetic products become the first and only line of defense against anything that makes contact with the surface. It is important to understand that cosmetic products cannot be relied upon to provide long-term or, in many cases, short-term protection. As many history professionals have learned, most cosmetic products are susceptible to damage from common liquids. As a result, when cosmetic products are used to protect the floor from liquids but damage occurs, it is not because the products have failed; they have been misused.

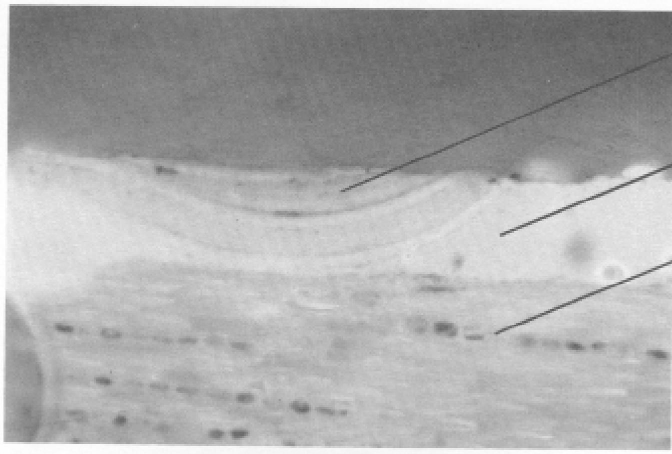
- Poor maintenance procedures. Cosmetic procedures and products are part of a continuing maintenance program. If recommended maintenance procedures are ignored or the intervals between procedures are too long, serious and costly problems can occur. Invariably, cosmetic products are recommended to be applied and removed periodically to avoid excess accumulation. Failure to remove multiple applications that have accumulated over extended periods of time is the most common misuse of these products. Excessive accumulation will make future cleaning and refurbishing more difficult, more expensive, and far less dependable. It may also create certain problems—slippery and hazardous surfaces for pedestrian traffic, chipping and delamination in areas, and color variations to name a few. Poor maintenance procedures and misuse of cosmetic products can make life miserable for property managers.



The bar graph indicates the increase in the amount of wood floors going into structures after the turn of the century. Prior to this time, no records were kept on the number of board feet being distributed. The popularity of wood floors was severely affected by the introduction of wall-to-wall carpeting. This dramatic decline is the primary reason for the sharp drop in the number of experienced wood floor tradespeople.

- Dependence upon cosmetic products to provide long-term economic solutions. When these products and procedures are used repeatedly to resolve stubborn and persistent problems, the process can become expensive and frustrating. As mentioned earlier, when cosmetic products are used to enhance the look of a well-sealed floor, they work well. When they are used to repair wood after it has been damaged, the results can be disappointing. Unfortunately, this is often the situation. In this case, the products are being asked to do something they were not intended to do, have not been formulated for, and lack the physical ability to accomplish.

Summary. Cosmetic procedures represent the most logical starting point in any wood floor restoration plan. The key to the success of this procedure is the existence of a sealant. If the protective sealant is present and intact, it may be possible to remove accumulated layers of wax, dirt, grime, and oils. This would represent the least expensive and least time-consuming option. However, if the sealant is damaged or has deteriorated due to age and use, cosmetic products will not provide the needed protection. Consequently, attention should be focused on repairing or replacing the sealant. Without an adequate sealant, the frequency of refurbishing will be greater and the chance for damage to the wood higher. In terms of cost, it is difficult to put a specific dollar amount on these procedures because the process is continuous and at times can be sporadic. Over extended periods of time, costs for maintenance personnel and materials could be significant.



This cross-section sample magnified 250 times under ultraviolet light shows at least seven generations of floor finishes on top of wood fibers. Dirt trapped between the layers indicates considerable time passed between the application of each new layer. Under the microscope the orange autofluorescence (glow) of the lowest finish layer indicates the presence of shellac. *Photograph by Susan L. Buck courtesy SPNEA.*

AGGRESSIVE RESURFACING AND REFINISHING

Defined and objectives described. Aggressive resurfacing removes all surface materials by using high-speed sanding devices. The most frequently used machinery in this operation is the large drum and belt sander. In confined areas (stairs, perimeters, narrow passages, etc.) the larger sanding machines are augmented with similar high-speed sanders. Many grades of abrasive sandpapers are used on the machines to facilitate the removal process. Beginning with the more coarse grades of sandpaper, the initial passes with the machinery result in total removal of all materials as well as measurable amounts of wood. The successive finer grits of sandpaper are used to remove the abrasive characteristics left by the previous passes of the machines. Eventually, the surface is brought back to a smooth condition and prepared for the application of the finishing products. Some amount of surface abrasion will continue during the finishing stages, but this is being performed to enhance the look and the inner coat adhesion of the finishing products.

This form of surface preparation has been popular since the late 1920s and early 1930s. Prior to that time, a variation of these procedures was performed with hand-held tools—planes, wood scrapes, chisels, etc. These methods also resulted in the removal of not only the accumulated surface materials but considerable amounts of the wood substrate as well. The impressionist painter Gustav Caillebotte captured this procedure in 1875 in his handsome painting *The Floor Scraper*. After the artisans had removed all surface accumulations, they used a variety of abrasive procedures to complete the surface preparation.

Advantages and disadvantages. The biggest advantage of aggressive resurfacing is that all residual surface material is totally removed. Stains, dyes, or finishes may be used to complete the project. Their application can take place without any concern for adhesion failure to the old substrate since all incompatible material has been removed. This would ensure the maximum performance of these finishing products.

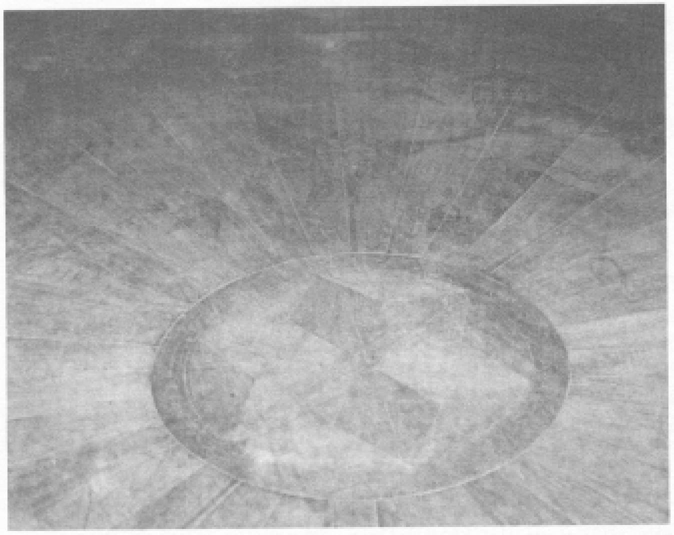
Since all surface material is being replaced, another strong advantage in managing the surface is that new finishing materials may be selected with a more thorough understanding of what the long-term maintenance plan will be. This puts history professionals and curators in the more desirable position of designing and budgeting for future maintenance according to their selection of products as opposed to having always to contend with products they inherited. This process should result in more manageable budgeting for wood floor maintenance after the initial expense of resurfacing has been completed.

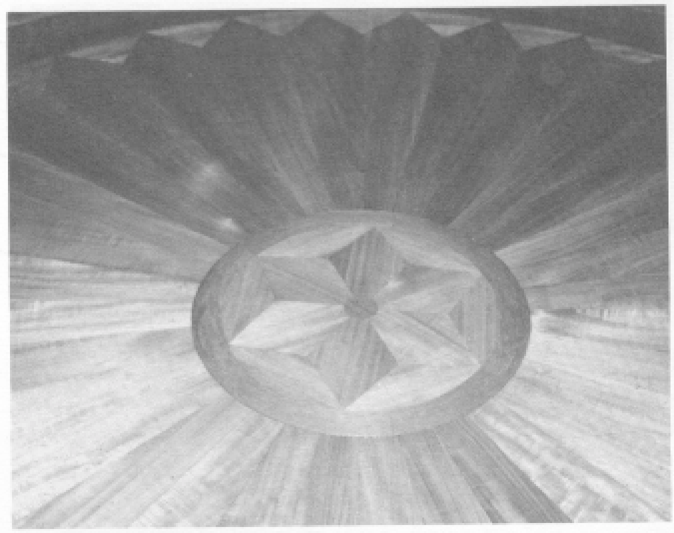
The biggest problem with aggressive resurfacing is the amount of wood removed. There is no set number of times a floor can be refinished as this will depend on factors such as species of wood, wood thickness, workers' level of experience, etc. However, a point will be reached when aggressive measures are no longer an option. This is a genuine concern since replacement costs are high. If the floor has significant historical value or involves exotic wood, the replacement cost can be extremely high, and the loss of the surface may compromise the historic integrity of the structure.

Another issue that sometimes poses a problem is the physical look the newly refinished surface displays. Aggressive procedures will remove all surface characteristics and leave the area with a uniform look. Some history professionals feel the look is too new or too manufactured and resent the loss of surface detail that accumulated over years of use and gave the floor character. The fear is that the newly finished surface is out of character and in contrast to older features of the structure. Although aggressive resurfacing offers a number of positive advantages, for many history professionals, these are difficult compromises to accept.

PASSIVE RESURFACING

Defined and objectives described. A passive system involves the removal of all surface coatings and surface accumulations without the loss of significant amounts of the wood substrate. It does not involve the use of aggressive drum and belt sanders or high-speed rotating sanders around perimeters and confined areas. All surface materials are removed with the aid of chemical





Before and after photographs of the entrance to the music room at Stan Hywet Hall in Akron, Ohio. Prior to restoration, the grain pattern and detail of the sunburst inlay was noticeably obscured by years of surface accumulation. Note dramatic change in the appearance of the area after surface finishing had been completed. *Photograph by Michael Purser.*

stripping agents and manipulation of these products with buffers when necessary. It may also rely on a mechanical process that involves buffers and scouring pads. This procedure differs from the cosmetic approach in that it removes the sealant, allowing for direct contact with the wood substrate. All abrasive materials used for these passive procedures are far less aggressive than the course grit sandpaper used in aggressive resurfacing. The measurable amount of wood removed using a passive system is extremely small compared to that removed with the aggressive methods. Since this procedure focuses on the removal of surface accumulations only, the wood sustains little erosion, and its durable life span is greatly extended.

Advantages and disadvantages. The primary advantage to the passive system is that all surface accumulations may be removed without altering the substrate. Once these surface accumulations have been removed, the wood can be treated much the same as if it had been prepared by using aggressive techniques. Administrators now have the option of choosing finishing products that will provide the necessary protection and long-term maintenance systems they desire.

The most attractive feature of the passive system is that the removal of all surface materials does not come at the expense of altering the surface characteristics that have accumulated over the years. All surface detail indentions, compression scars, scratches and scars, and any traces of planing or mill work from previous or original installation and finishing would be left intact. The deteriorated and damaged surface accumulations would be gone. In short, the old floor would have a restored look, not a new or manufactured look that many associate with the aggressive procedures.

The disadvantages of passive resurfacing are due more to its growth or developmental pains than anything else. Some of the technology required for this procedure is still being developed. This option may not be available in all cases because product development has not caught up with the variety of situations that may be encountered. In the past, it was possible to accomplish this procedure only with products that contained methylene chloride, a chemical hazardous to humans and the environment that could seriously damage the wood if used improperly. It is also a fire hazard. A variety of manufacturers are now producing chemical strippers that are much less hazardous and have good performance characteristics. They are more expensive, but the advantages are too attractive to be ignored. Some coatings do pose more of a challenge than others to remove, but this technology is still evolving, and any glitches will likely be resolved.

Because of the risks listed and the unpredictability of trying to remove layers of surface accumulations, passive resurfacing is the exception and not the norm. At this time, the process is not as well defined and predictable as the aggressive procedure. When some contractors view this option, they think there are too many variables to be considered and feel the chance for problems and frustration increases. Consequently, there is a much stronger reliance upon the more predictable and familiar aggressive resurfacing even though the loss of wood and surface detail prove to be bothersome to history professionals.

Summary. Aggressive and passive refinishing represent the most extreme of the three courses of action. Both remove all surface accumulations and protective sealers but employ very different techniques. The advantages and disadvantages to either approach should be studied carefully to ensure that all parties thoroughly understand the procedures and the results of each. Both procedures would represent higher initial cost outlay with the savings occurring through reduced or more efficient maintenance.

FINISHING OPTIONS

For some, the selection of a course of action is less of a challenge than selecting the appropriate finishing products. The number of factors that enter into this decision can be distracting and intimidating. However, listing the priorities and finding products that satisfy these criteria usually will facilitate matters.

PROTECT THE SUBSTRATE

First and foremost, any product that is put on a wood floor must provide adequate protection. More specifically, the product must provide protection from liquids with which the floor may come in contact. Many feel that abrasion is the primary culprit, and it certainly can create problems. However, the overwhelming amount of serious and permanent damage that occurs to wood floors is caused by liquids. It is far more likely that preventive measures can be taken that will dramatically reduce surface abrasion. As mentioned earlier, liquids are insidious in that they capitalize on the laws of physics to intensify the damage. They also differ from abrasion in that they require little, if any, energy to create the damage. When used correctly, protective coatings and sealers do not detract from the floor's aesthetic qualities. Skeptics should remember that it is much easier to target the source and cause of abrasion than it is to rewrite the laws of nature and physics.

REALISTIC AND OBJECTIVE PRODUCT ASSESSMENT

History professionals should pay careful attention to the source of information they rely on concerning the finishing products available. Considerable information exists that does not do justice to the variety and complexity of products available. Judgments are made by individuals who have good writing skills but little, if any, experience in working with the products. Products should be judged by their ability to perform the necessary duties as they relate to the specific needs of the project. In most cases, seasoned and experienced professionals can provide useful insight into the performance characteristics of the products.

Products should also be objectively assessed. The selection of products available today is much broader than at any time in the past. Part of this selection includes products that have evolved from sophisticated technology that is intimidating and difficult to understand. Some of these products are often shunned because of a negative connotation attached to the material, being characterized as artificial, plastic, or synthetic. This is unfortunate, and it has resulted in considerable misunderstanding and misinformation. Care should be taken to evaluate products on their individual merits instead of selectively disqualifying them due to their chemical composition. As complicated as wood floor management might be, it is best to keep the project's objective clearly in focus. All products should be thoroughly investigated and objectively judged.

UNDERSTAND PRODUCT DIFFERENTIATION

Efforts should be made to better understand the differences between the types of finish products, and how they function. As is often the case within a line of products, different materials are formulated for different situations. Coatings formulated for recreational areas (i.e., basketball and racquetball courts) or industrial use typically tend to leave a heavy, high-gloss look. For these situations, this is often the ideal result. However, when these same products find their way into historic and high-profile structures, they tend to create a look that is not compatible with the surroundings. Likewise, a number of fine cosmetic products exist that will create a handsome and aesthetic look. The fact that this same product may not provide the protection necessary for the surface is not a fault of the product. By accumulating information and studying products for their strengths and weaknesses, it is less likely pitfalls will occur.

SAFETY AND ENVIRONMENTAL CONCERNS

Attention should be paid to the products, their compositions, and the possibility they contain harmful vapors and chemicals. With increased emphasis on providing a safer work place and less contamination of the environment, care should be taken in the selection of finishing products and solvents used in the cosmetic procedures. Particular attention should be paid when the aggressive procedure is used to remove lead-based paints. Dust should be contained as much as possible, and all by-products should be disposed of in accordance with local environmental regulations.

PRODUCT REVERSAL

The question of whether the finishing products are reversible is becoming more of an issue in historic structures. It should be addressed with care since it can have some bearing on future restoration efforts. With protective sealers and coatings, the question would focus on whether the product would require aggressive removal or if it could be removed by using passive methods. Care should be exercised in looking at any penetrating finishing products as they are dependant upon penetrating the wood to be effective. These may be far more difficult to reverse than protective coatings that lie upon the surface.

REALISTIC PERFORMANCE EXPECTATIONS

There are no miracle products available that will solve all the problems related to wood floors. The finishing products are only one element in a sequence of events that will lead to better wood floor management. It would be inappropriate and poor judgment to expect a finishing product to resolve all problems. The selection of a product should be based on what demands are being made of that particular area. High-traffic and high-use areas will require more attention and maintenance than areas that receive little use. Variations in the use of an area may dictate different finishing products and a different maintenance schedule.

Attention to Historic Requirements

With historic properties, there is often a strong desire to reproduce what had been done in years past. Care should be exercised if more traditional products are selected as the current use of the areas may push the products beyond their limits. There is a trend toward duplicating the look of older procedures with modern products that are more capable of enduring the new and increased use of the area. Emphasis here is on the ability of the contractor to manipulate the products to create this look without altering the character of the area. Although a compromise is being made, it is one that should not detract from the structure.

Preventive Measures and Techniques

Regardless of what course of action has been selected, it is imperative to establish a preventive program that will help control the major threats to wood floors. In light of all the steps that might be taken in managing wood floors, this one phase may produce some of the most positive results. Preventive measures are designed to focus on the two primary sources of damage—abrasion and liquids.

There is no mystery as to what causes abrasion. Any time an object or material of equal or greater hardness than the wood or its protective coating makes contact with the surface, abrasion will occur. Consequently, it is imperative that all articles that make contact with the surface be made compatible with the wood floors. No exceptions can be allowed. The simplest method is to use some type of thick textile product to interface with the article and the surface. This would exclude Teflon,™ plastic glides, rubber products, etc., which are too hard and would damage the floor. There are numerous options available, and all should be explored to find the most appropriate product.

At all entrances, pedestrian traffic should pass over a series of mats specifically and strategically placed to help remove fine particles of grit and moisture from the bottom of shoes. Under no circumstances should the public be allowed to enter without walking over these mats.

In the event that certain areas are rented or leased to the public for social functions, a comprehensive plan should be developed to accommodate the sudden surges in traffic and use these functions bring. Traffic flow, food and beverage service, placement of furniture and complementary objects, and a host of other considerations need to be anticipated and provided for in a logical manner. It is also wise to exercise control over decisions being made during this phase by using renting or leasing agreements. Decisions on placement of chairs and tables, flower arrangements, musicians, dance areas, etc., should not be dictated by clients renting the area. Prior to entering into the agreement, the administrators of the historic property should have optional patterns for all of these considerations with the priority being the preservation of the wood floors.

In regard to the threat to the surface presented by liquids, several steps can be taken. Coatings are available that will provide excellent protection. Maintenance personnel should be trained in proper procedures when liquids are used to clean and maintain the surfaces. It would also be wise to periodically check potential problem areas. Rental or leasing agreements should be very specific about the placement of wet bars, floral arrangements, or any other situation that might result in unnecessary damage. And, of course, clean up after social functions should be expeditious.

Summary

Successful management of wood floors in historic structures is a realizable goal. It is not something that is the result of secrets, magical products of the past or present, or abnormal amounts of labor and money. When one considers how dependent any structure is on the wood floors to provide an aesthetic and functional surface that is constantly in use, one begins to see the real challenge involved. Decisions need to be made that incorporate current needs and challenges with an eye towards future use and maintenance. It is this foresight that is the cornerstone of successful wood floor management.

Michael Purser specializes in restoring old wood floors. His company, the Rosebud Company, was started in 1973 in the older neighborhoods of Atlanta, Georgia. Today, the Rosebud Company offers contractual and consulting services to private residences and historic properties. ■

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HISTORY NEWS TECHNICAL LEAFLET

A PUBLICATION OF THE AMERICAN ASSOCIATION FOR STATE AND LOCAL HISTORY

How To Write A Furnishing Plan

BY MARIANNE CURLING

"The fact of the matter is simply that the demands of every house being of a remarkably individual nature, any special detailed set of recipes regarding the subject would be useless and superfluous." [1]

So stated Albert Haberstroh in *Art in Decoration,* one of the many guides to furnishing a home published in the last quarter of the nineteenth century. And while each house, each space, is individual, there are enough common elements and experiences to guide the furnishing plan writer. The purpose of a furnishing plan is to record in two-dimensions a three dimensional, multi-layered space. Primarily used for houses, furnishing plans are an appropriate method for documenting any room-like space. This technical leaflet provides the user with an overview of how to write a furnishing plan. The bibliography at the end offers more information. To assure your own success, take the time to review as many of the listed guides as possible.

To recreate the furnishings of a space seems a simple enough task. As you begin to think about the process, take a few minutes to consider your current surroundings. Select a corner of the room, your desktop, or another discrete space and using the formula for a good lead in a news story, identify the "who, what, when, where, why, and how" for your particular space.

- **Who was the space created for and who uses it now? Who decided what the function of the space should be?**
- **What is the primary function of the space?**
- **What are the decorative features of the space?**
- **What are the major furnishing elements of the space?**
- **When was the space created and when was/is it used? Did/does its use change over a day, a week, from season to season?**
- **Where is the space located?**
- **Why do you occupy this space?**
- **How was the use determined? How does the space relate to its surroundings?**

Once you have answered those questions record an item-by-item inventory of your current space and prepare background files on the inventoried items and surface finishes. Sale catalogs and periodicals, receipts and notes, samples and photographs all become part of the record. Be sure to include references to anything that might have influenced your decisions for the space along with the information directly related to the inventoried items. If, for example, you recently purchased a carpet and still had samples of three carpets you did not select, recording the "losers" can be as important as documenting the "winner."

Finally, imagine the space empty of any visible vestige of the furnishings and all surface finishes removed. For any given space, original elements survive in percentages that range from zero to one hundred percent. On a sliding scale, remove a percentage of your inventoried pieces. What level of conjecture would you need to prepare a reinstallation plan for a space ninety percent intact? What about a space fifty percent intact? If you had the total contents of your current space and simply needed to reinstall it exactly as appeared before you removed everything, how long would it take you to get every element back in place? A properly organized and documented furnishing plan would speed the reinstallation process substantially.

If the structure is newly acquired or has never been studied, first and foremost document the building and its contents in their current state and make sure that the structure and anything it contains is safe from the weather and/or vandalism. Do not make any changes. Do not throw anything away. Proceed with caution and an open mind. Also, be careful to not over clean. The scraps of wallpaper sticking to the floor might turn out to be the only original bits left to document what was in the room. Leave all worn carpets, window shades, and attic detritus in place until a complete plan is developed.

A complete furnishing plan should include an overview of the scope of the project, a site description, profiles of the occupants, a presentation of the predominant styles used to furnish the rooms, a traffic flow floor plan, an individual room plan for each space, and appendices as needed to list illustrations, present a bibliography, and provide a chronology of the space from its inception to the present. The author should include avenues of research that were not successful and record questions not answered as part of the report. Ideally, a furnishing plan should be written as one aspect of a larger assessment of a structure including a landscape history and site plan, paint and materials analysis, an archival survey, and measured drawings, as it will incorporate aspects of all of those collateral studies. The furnishing plan draws from all those reports and is the last document produced. It's difficult to complete projects under ideal conditions, therefore, it is good to move ahead with what can be accomplished.

The first step toward preparing a furnishing plan is to establish a chronology for the structure and identify the occupants from its inception to the present day. This chronology will provide a basic understanding of when and how the building was used and will be included as an appendix to the furnishing plan. Research, research, research! Now is the time to be sure that all of the relevant archives on-site are listed and in order. Search public and private records and interview (tape record please) anyone with an association to the structure. Begin with the ownership of the land the structure occupies, the creation of the building and who first owned the structure. Then continue by listing the occupants and any significant events. For a residence these include births, marriages, deaths, etc.; for a work site include changes in ownership, leadership, or the introduction of a new product. Follow those with any significant events in the community (local factory burns, brother-in-law elected mayor), for the state, and nationally. Continue the list by adding any known servants/workers and, for residences, the census records for any year available for public use. If exact dates are not available bracket the information and add it to the list with estimated dates. As you learn more, many of the exact dates should become clear. Finally, be sure to list any known structural alterations as part of the chronology. Review any archival materials on-site along with those held in other collec-

[1] Albert Haberstroh, *Art in Decoration*, Boston: ?, 1889, pg. 38.

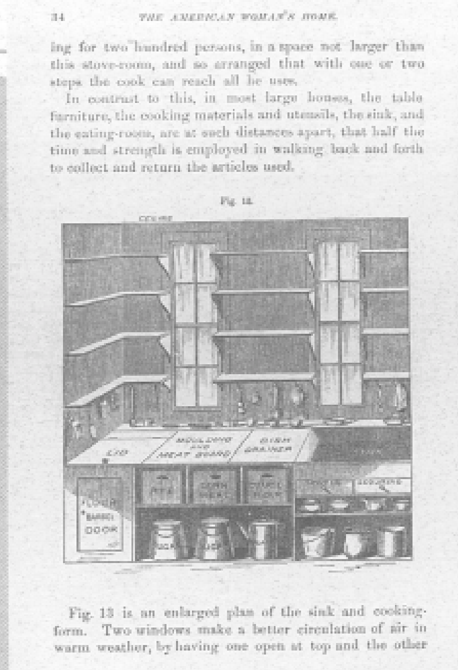
tions. On more than one occasion, significant materials were given to another regional institution because the site now under review was not yet publicly held or a stronger tie for the donor existed elsewhere.

By listing the basic chronology, you have established the context needed to determine the focus of the furnishing plan. Identify and define the purpose of the furnishing plan and how it fits into any larger interpretive goals of the sponsoring institution. At the outset, identify the interpretive objectives and themes for the space(s) under review. Will visitors experience the space as part of a guided or self-guided tour? What is the traffic pattern? Will visitors walk through rooms or look in through doors or windows? What supporting materials or media will visitors encounter before entering the space(s) covered by the furnishing plan such as orientation films or exhibits? If you have not identified your major interpretive themes for the structure previously, now is the time to do so.

One exercise to accomplish this is to prepare a script for the ideal visitor experience for the spaces under review. You can organize furnishing plans in innumerable ways, but they should all contain the following basic sections.

Scope of Project/Project Overview

This summary serves as the introduction and defines the scope of the project, documents the process of developing the furnishing plan, and acknowledges all those who contributed their efforts. Be specific about the parameters of the plan. Provide the reader with dates, list the spaces covered in the plan, and introduce significant events and personalities. While you have been working on this project for months or over a period of years, chances are good that your readers may be coming to it with little or no knowledge of the site. Provide the reader with the philosophy underpinning the plan and the impetus for preparing it. If, for example, the furnishing plan focuses on a particular resident, event,


34 THE AMERICAN WOMAN'S HOME.

ing for two hundred persons, in a space not larger than this stove-room, and so arranged that with one or two steps the cook can reach all he uses.

In contrast to this, in most large houses, the table furniture, the cooking materials and utensils, the sink, and the eating-room, are at such distances apart, that half the time and strength is employed in walking back and forth to collect and return the articles used.

Fig. 13.

Fig. 13 is an enlarged plan of the sink and cooking-form. Two windows make a better circulation of air in warm weather, by having one open at top and the other

The American Woman's Home by Catharine Beecher (1800-1878) and Harriet Beecher Stowe (1811-1896) and published in 1869 included this illustration of the amenities and layout necessary for a modern, functional kitchen. Part of the "how to" literature dedicated to keeping house, it encapsulates what was needed for one aspect of a functional kitchen and provides a ready checklist for anyone preparing a kitchen plan. Figure 13 was described as "an enlarged plan of the sink and cooking form." The two windows created better air circulation in warm weather by "having one open at the top and the other at the bottom." Courtesy: Harriet Beecher Stowe Center, Hartford, CT. The long description is worth quoting for the detail of equipment and use:

"The flour barrel just fills the closet, which has a door for admission and a lid to raise when used. Beside it, is the form for cooking, with a moulding board laid on it; one side for preparing vegetables and meat, and the other for moulding bread. The sink has two pumps, for well and for rain-water—one having a forcing power to throw water into the reservoir in the garret, which supplies the water-closet and bath-room. On the other side of the sink is the dish-drainer, with a ledge on the edge next to the sink to hold the dishes, and grooves cut to let water drain into the sink. It has hinges, so that it can either rest on the cook-form or be turned over and cover the sink. Under the sink are shelf boxes places on two shelves run into grooves, with other grooves above and below so that one may move the shelves and increase or diminish the spaces between. The shelf-boxes can be used for scouring-materials, dish towels, and dish-cloths; also to hold bowls for bits of butter, fats, etc. under these two shelves is room for two pails, and a jar for soap-grease.

Under the cook form are shelves and shelf boxes for unbolted wheat, corn-meal, rye, etc. Beneath these, for white and brown sugar, are wooden can-pails, which are the best articles in which to keep these constant necessities. Beneath them is the tin molasses-can with a tight, moveable cover, and a cork in the spout. This is much better than a jug for molasses, and also for vinegar and oil, being easier to clean and handle. Other articles and implements for cooking can be arranged on or under the shelves at the side or front."

pp. 34-35
Catharine E. Beecher and Harriet Beecher Stowe. *The American Woman's Home: or, Principles of Domestic Science; Being a Guide to the Formation and Maintenance of Economical, Healthful, Beautiful, and Christian Homes.* New York: J. B. Ford and Company, 1869. *Image courtesy of Harriet Beecher Stowe Center, Hartford, CT.*

or time period, now is when that should be clearly stated for the first time. Address what level of interior documentation was available to create the plan. Say who wrote the plan and identify the owner of the property and the property by name. Include the status of the site as a national historic landmark or other designation and when it received that distinction. Include a statement about what the next steps toward implementing the furnishing plan are and propose a potential timetable. While the first section to appear in the report, this is usually the last section written.

Site Description for both original and current situation of the structure

Prepare a site description for the original situation of the property. If a historic landscape plan exists for the site, a synopsis of the predominant features of that report along with who produced it and when it was created can be included as a summary statement. Also, let the reader know how to get a complete copy of the landscape plan if needed. If no landscape plan is available, the description should at a minimum present the relationship of the structure with outbuildings and adjoining properties and address any transactions related to the property along with its current size and dominant features. Document through civic records any transactions that occurred. Get copies and prepare transcriptions. Pay particular attention to easements and rights granted to neighboring properties and check the record of adjoining properties for rights granted to the site under consideration. Include a description of the historic nature of the property—farm, townhouse, schoolhouse, strip-mall—and how the property fit into the surrounding community. Additional information on the community should include access to shopping, mail delivery (or not), predominant aspects of rural, town, or city life (seasonal routines), regular events—anything that helped shape the way the structure was used. [If a home is under consideration, for example, understanding which door the family used most frequently to come and go will guide the interior furnishings and influence traffic flow through the house.] A map of the site should be included as one of the first listed illustrations along with any exterior images of the structure.

While documenting the original situation of the building or space, be sure to record the current situation with the same patterns of everyday use considered. How do staff and visitors enter the building? What time of day is the building in use? What are the owning organizations hours? Do you escort visitors into the building or do they enter on their own? What security measures are currently in place and are additional measures necessary?

"The Kitchen" first appeared as plate 6 of "Prang's Aids for Object Teaching, Trades & Occupations" in 1874. Harold Peterson included it in his pictorial source book *American Interiors From Colonial Times To The Late Victorians* as plate 124 in 1971. His caption detailed many of the visible items:

"By 1874 the ideal American kitchen had progressed mightily. Louis Prang could illustrate for his teaching series a fully equipped food preparation center with an iron coal range connected to a hot water tank. Nearby is a sink with hot and cold running water, though there is still a wooden slop bucket standing next to it. The floor is of plain wood, but a tile hearth affords safety from fire beneath the stove. On the hearth sits the coal scuttle with its small shovel, and on the other side lie two of the stove lids that have been removed from beneath a couple of the iron cooking kettles. Against the brick chimney front on the left rest the essential tools for coal stove operation: a whisk broom and a dustpan for cleaning up ashes and coal dust, a poker, a wrench for shaking down the ashes, and a lifter for removing hot stove lids. The wall clock is a spring type, and the roller towel at the extreme right is of a type that was still common in American country kitchens until World War II. Barely visible in the windows at each side are spring roller shades with painted or printed designs. Finally, here is a good picture of what a well arranged kitchen cupboard might have contained if the cook had been an artist like Mr. Prang!"

While Catharine Beecher and Harriet Beecher Stowe emphasized food storage and necessities kept near the sink, Harold Peterson detailed the tools required to operate a range in a timely manner. The sink and running water are the only items found in both kitchen descriptions. *Courtesy: Library of Congress.*

How do you receive deliveries? Determine what external factors will influence or even override the historic setting of the spaces documented and interpreted as part of the furnishing plan. Present the traffic flow floor plan as a brief narrative of the interpretive and physical highlights the visitor will encounter as they progress through the structure. Include a drawing of the proposed route on the building floor plan in the illustrations.

Descriptions of the occupants:

Each occupant of the structure should receive as complete a profile as can be determined. Include birth and death dates, and dates and descriptions for significant life events. These descriptions need to reveal to the reader who these people were and what traits and habits defined them and their use of this structure. Include physical traits such as general appearance and any known infirmities such as hearing loss, use of a wheelchair, or bad eyesight. In preparing a furnishing plan for a household, it is certainly worth knowing that the lady of the house had her breakfast in bed every morning if that was the case. Equally worth knowing is when the kitchen fires were lit and by whom. If an office space is under review and the executive in charge arrived everyday at 8:07, the information and its source should become part of the record. Refer to any memoirs or diaries that might have been kept and how reliable a source the person recording the information was. Describe each resident's primary occupation and how he or she fit within the larger community. If possible include whether or not they were religious and/or civic minded and what their everyday attitudes and interests were. Did they entertain frequently? Who made up their social circle? This is the appropriate section to include cherished pets as well. How did the residents accommodate birds, dogs, cats, hamsters, or other creatures within the structure? Carefully footnote all sources and include photographs or other known images of anyone profiled.

An Overview of the predominant decorating styles in use in the structure and the technology available.

As a general rule, the decorative styles most popular for one generation are the styles most likely to be rejected by the next generation. It is a rare person who would recreate how a parent decorated the home of his or her youth. Yet I know that at sometime in the not too distant future avocado and gold kitchen appliances and accessories will again be considered chic (or maybe not). For anyone attuned to larger stylistic changes, there is enough variation in decorating preferences from one decade to another to rule out a substantial percentage of what is chronicled in resources for historic interiors. It is helpful to provide the reader with an overview of the predominant decorating styles featured in the furnishings listed for the structure. Include visual and written descriptions of the most complete installation example of the style you can find (wall, window, floor and furnishing treatments) even if what appeared in the structure was only a pair of chairs in the described style. Include when the style was introduced and how long it was considered fashionable.

It is also useful to review the technology available in the structure with a strong emphasis on the period of interpretation. Each method of lighting—by lamp or candle, gas fixture or electricity—comes with its own required accoutrements necessary to present the visitor with an accurate depiction of the period presented. For lighting elements, styles of fixtures and types of bulbs evolved decade by decade. This is the opportunity to present what should be installed. Plumbing, kitchen fixtures, and the telephone all have had generations of new and improved equipment introduced in rapid succession. Include as well any equipment required for maintenance of the structure and for the mechanical systems. Heating and cooling have always been a part of creating the interiors of structures.

Individual Room Plans:

The majority of restored rooms presented at historic sites today have the well-deserved reputation of being static entities. I was a participant in "Collecting and Interpreting the History of Home and Family," a seminar jointly sponsored by the National Endowment for the Humanities and American Association for State and Local History held at the Strong Museum in 1987. One of the most memorable presentations was by George McDaniel, currently the director at Drayton Hall. He documented his own family's use of their dining room table over the period of a week. Among other uses, it was the place to deposit small parcels and mail, pay bills, and stack children's school papers. On a weekend evening guests were treated to a lavish dinner and the table setting featured silver goblets collected over a number of years and place settings of wedding china. Of course, the point of his presentation was that the lavish dinner is practically the only table setting shown in a historic house and that the opportunity to provide a more complex interpretation of room use in a household is missed by only presenting a single "event" use.

The brief history of the space and its role within the structure will point to interpretive themes. Integrity of presentation will determine the best interpretive strategy. If there is no opportunity to acquire the furnishings and finishes appropriate for the space, the site might best be served by a panel or other media presentation on what those furnishings and finishes should be rather than installing inappropriate pieces. Consider the "type" of space being documented: an intact interior, an interior connected to a specific person, family or event, or an interior meant to be a generic interpretation of the space. Each type has its own specific needs for documentation. An intact interior requires item-by-item descriptions including balancing objects which moved between spaces over time.

Begin with a general overview of resources and conclusions that are common to the project. If there is a completed historic structure report, provide a summary of the elements found universally throughout the structure. Include a statement detailing who produced the report and when. Again, let the reader know how to get a complete copy of the historic structure report. If no analytic record of the physical history of the interior spaces exists, document each finding or assumption within the individual room descriptions. The individual descriptions of each space covered as part of the furnishing plan should include:

A brief history of the space and its role within the structure

Include the complete history of use for the room and detail how and when that use changed. If the nursery changed to a young adult room and later became the living room of an apartment when the building use was changed, record the specific changes for this room in this section.

Interpretive themes and strategy

Given the history recorded above, define what the visitor should leave the room knowing and how the room installation and its interpretation will accomplish that.

Furnishings (including all textiles and wall pieces) listed and described

Along with a physical description of each item currently in the room, give the historic, present, and future role of the item in the room plan.

Furnishings placed on plans

On the room floor plan and wall elevations, place the furnishings listed above as they are currently in use on one set and how they will be installed for the furnishing plan implementation on another.

The restored kitchen at the Harriet Beecher Stowe house in Hartford, Connecticut presents elements from both period illustrations presented here, as well as from a number of other period sources. The end resultresult is largely satisfactory with only one large element—the water heater—missing and the tools for maintaining the range not readily apparent. If you have listed the items from both period illustrations, compare that list with this image of the sink and range zones of a recreated kitchen. *Photo courtesy of Harriet Beecher Stowe Center, Hartford, CT.*

Structural changes necessary to implement the furnishing plan

List each and every element that needs to be changed. If windows or doors have to be shrunken, enlarged or eliminated, closets or walls removed, moldings removed or added, surface finishes replaced, and/or the door sill repaired, provide a brief summary of what needs to be done, why, and when in the process of implementing the plan the work should occur.

Historic Structure Report finish and structural history

If there is a completed historic structure report, provide a summary of the predominant features of the report findings for this room. Otherwise, provide the documentation for the surface finishes and structural elements of the room.

Supporting documentation:

Written primary and secondary sources should be included in both the appropriate section footnote or section endnote and listed as part of the report bibliography. List and present as an illustration any image used to either document or describe the history and/or future installation of the space.

Follow the individual room plans with these appendices:

A. Chronology of the house from its inception to the present
B. List of Illustrations (This list is frequently placed behind the table of contents.)
C. Bibliography

Once the Furnishing Plan is complete, you can successfully establish a budget and timeline for implementation. Then the real fun begins: having created a record in two-dimensions of a three dimensional, multi-layered space, it is time to put the two-dimensional record into three-dimension use.

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WEB SITES OF INTEREST AND USE:

www.cr.nps.gov
Look under "I'm looking for" go to "Historic Buildings & Structures" and "Museum Management Program."

http://americanhistory.si.edu/house/default.asp
"This Web site from the National Museum of American History (NMAH) opens a door on the everyday history of American families from 1757 to 1945. The exhibit is organized around a house in Ipswich, Massachusetts and five of the different families that lived there over time. Visitors can click on one of the family names at the top of the page to bring up a thumbnail introduction to the family, images and descriptions of artifacts from their house, and a brief description of how they used one of the rooms of the house. The House Clues section talks about how one uncovers the history of a house and its inhabitants, while This House explains a bit about the Smithsonian's acquisition of the home in the exhibit. The Resources section should prove useful for instructors or those inspired to delve further into the subject, as it features both a series of lesson plans and a list of additional sources (online and in print). [TK]"

www.nationaltrust.org

www.nps.gov/hfc/furnish/index.htm
Department of Historic Furnishings at the National Park Service.

AASLH
TECHNICAL LEAFLET #244
A PUBLICATION OF THE AMERICAN ASSOCIATION FOR STATE AND LOCAL HISTORY

How Sustainable Is Your Historic House Museum?

By AASLH's Historic House Affinity Group Committee

Dateline: **Anytown, USA**
Headline: **Historic House Museum Permanently Closed**

Unfortunately this is an all too common story these days as funding for small museums becomes scarce, hours donated to docent programs and boards of directors decline, and the public has multiple educational and recreational venues from which to choose. As staff and volunteers at historic house museums, we understand the need to preserve and interpret local history and relate it to broader regional and national themes. But the myriad of challenges we face, including declining public visitation and mounting maintenance expenses, can sometimes be overwhelming.

How can your historic house museum avoid pitfalls and take advantage of help that is available? How do you even know if your organization is in trouble or if it is just experiencing a couple of bad years? The Historic House Committee of the American Association for State and Local History (AASLH) is tackling these questions in an effort to forestall the decline of historic house museums in peril and outline a path back to a healthy and vigorous future.

Background

The purpose of this technical leaflet is to provide boards and staff of historic house museums with a tool for assessing the long-term strength, stability, and staying power of their own missions, governance, programmatic, financial, and stewardship responsibilities and activities. It is the result of work begun in 1999 by AASLH's Historic House Committee and with conferences sponsored by AASLH, the National Trust for Historic Preservation, and the American Association for Museums in both 2002 and 2006. The issue of "too many house museums" led to discussions of what makes a historic house museum sustainable and which historic house museums might serve as good examples of sustainability. In 2006, the Historic House Committee initiated a project to identify characteristics of sustainable historic house museums and to pinpoint characteristics of historic house museums at risk. The purpose of this leaflet is to generate ideas and discussion regarding long-term sustainability, defined as the long-term capacity of a stewardship organization to ensure adequate audiences and financial support to preserve and maintain its buildings and landscapes.

In developing this leaflet, the Committee asked for feedback from AASLH members at two AASLH Annual Meetings in 2007 and 2008, from leaders in the field, and from some funders. The Committee initially based the examples of sustainable historic house museums included in this leaflet on a thorough search for house museums to consider for examples of sustainability. Once we compiled a list of house museums to consider, we engaged in a comprehensive vetting process that included interviews with executive directors and other staff, review of some specific house museum documents including financial records, review of Guidestar and other public financial records, programmatic offerings, visitation statistics, community participation and value, professional and board development activities, the state of buildings and collections, and the state of board recruitment and staff turnover. In addition, staff at historic house museums chosen as examples of a particular characteristic were then asked questions specific to that area.

This list of characteristics is intended as a tool for self-assessment. Each sustainable characteristic is followed by a set of questions for reflection and discussion. It is unlikely that any one historic house museum would answer "yes" to all of these questions. However, more "yes" answers will indicate a higher likelihood of sustainability over time.

At the end of each set of questions, there is an example of a historic house museum that addresses those questions and associated solutions head-on. Most of the historic house museums cited as examples for one section could be used to as examples for any or all of the sections. In fact, in preparing this leaflet, it was difficult to assign these house museums to any one area.

This sustainability tool provides historic house museum leaders with the bookends needed to ask questions and evaluate responsive actions and it supplements the AASLH Standards Program currently in development. Staff, board, and volunteers of historic house museums who are asking questions and seeking answers might start with this tool, then use the Standards Program to develop and map corrections once it is available to the field beginning in June 2009.[1]

In presenting this tool, the Committee included historic house museums with a variety of governance and management arrangements. One is a property of the National Trust, one is a state-owned and managed site, several operate with independent boards, and one example is a consortium of historic house museums. The committee also considered geographic representation. We urge readers to contact us with other examples of sustainable historic house museums for possible inclusion in a future publication.[2]

Characteristics of a Sustainable Historic House Museum

The following eleven points summarize the signs of a healthy, thriving historic house museum. While few museums meet all of the characteristics, most strong and viable organizations embody a preponderance of them. By weighing your museum's structure and performance against these eleven points, you can gauge the vitality of your operation and devise a path to a stronger future.

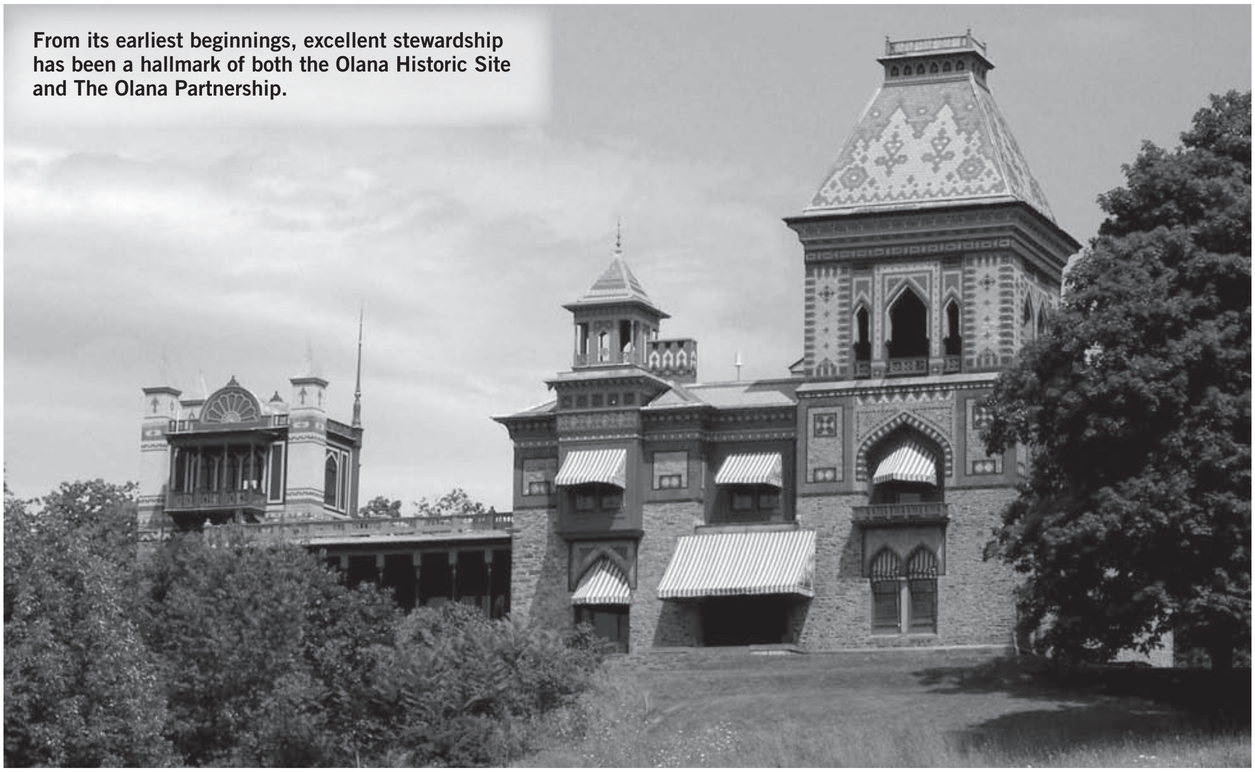
1. A sustainable historic house museum serves its audience and is valued by its community.

- Do historic house leaders:
  - Know the site's neighbors?
  - Identify audience needs and interests?
  - Regularly identify new audiences in planning programs and events?
- Do community groups and local institutions invite historic house leaders to participate in their programs and plans?

In Practice: Awbury Arboretum Association—Philadelphia, Pennsylvania (www.awbury.org)

Mission: *The Awbury Arboretum Association's mission is to preserve and interpret Awbury's historic house and landscape, thereby connecting an urban community with nature and history.*

In Action: The Awbury Arboretum Association is located within the historic district of Awbury Arboretum. Homes surround this historic site and neighbors serve on the board. It strives to instill values of preservation, conservation, and sustainability of the natural and built environment, through job train-



NYS OPRHP, Olana State Historic Site

From its earliest beginnings, excellent stewardship has been a hallmark of both the Olana Historic Site and The Olana Partnership.

ing and educational programs endorsed and supported by the neighborhood and community. Beginning with educational programming geared to local children who rarely experience the outdoors, Awbury has been in the forefront of environmental education in the section of Philadelphia known as Germantown.

In 2005, the site expanded its programming to include job training for at-risk young adults from eighteen to twenty-four years of age. As a result of the success of the program, the organization developed a for-profit landscaping company where graduates may be employed. The for-profit group is now an established, successful landscaping company that provides services to other nonprofit sites and organizations as well as local residents. In developing both the educational programming and the for-profit company, Awbury Arboretum worked with many different community partners including the Olney Redevelopment Corporation, the Philadelphia Water Department Office of Watersheds, and Germantown High School. Awbury Arboretum serves approximately 5,500 schoolchildren per year and graduates eight to twelve apprentices from its program annually.

The makeup of the board is essential to maintaining strong ties to its local community. At least one-third of its twenty-one board members must live within two miles of the site. One board member belongs to the Olney Redevelopment Corporation and others are involved in local schools.

The site's organizational goals for the next two years include expanding the landscape company to provide more opportunities for employment for trained apprentices and to use the fifty-five acres of the Arboretum to expand its relevance to the surrounding neighborhoods by providing science education, community gardening, and other programs that will lead to a more sustainable community.

2. Sustainable historic house museums are inspiring.

- Has leadership developed a vision statement that is inspiring to board, staff, volunteers, and audiences?
- Does the statement provide direction for the future?
- Is this statement widely distributed both inside and outside the organization?
- Do staff members use this statement to guide their work on a daily basis?
- What about the site is inspiring and why?

In Practice: Harriet Beecher Stowe Center—Hartford, Connecticut (www.harrietbeecherstowecenter.org)

Mission: *The Harriet Beecher Stowe Center preserves and interprets Stowe's Hartford home and the Center's historic collections, promotes vibrant discussion of her life and work, and inspires commitment to social justice and positive change.*

In Action: The Harriet Beecher Stowe Center uses the author's words to connect people with contemporary issues and actions in order to affect social change. The Center lists its mission statement on all publicly distributed materials and features it prominently on its website. Staff ensures that all programs address inspiration for action, financial viability, and increased visibility for the site. Programs are evaluated in part based on the actions people are inspired to take following their participation.

For example, the Center hosts a series of salons that draw participants from suburbs surrounding Hartford. Guest speakers begin each salon with brief remarks that present an issue to be discussed. Next, a staff moderator invites audience participation. Each session ends with a brainstorming discussion of the actions individuals can take. When participants attending a salon on human trafficking learned of a well-known website that enabled this practice, they contacted the website, ended their own use of it, and spread the word to others about this practice. Another salon on food distribution in urban areas inspired participants to become involved with local farmers' markets and the local food bank. These salons have been extremely well received and have grown largely by word-of-mouth. All programs, including teacher workshops, incorporate a section on "Inspiration for Action." Staff at the Stowe Center follow-up with teachers to learn how students are inspired to act.

3. Sustainable historic house museum leaders adhere to a standard of excellence.

- Do leaders:
  - Model excellence?
  - Encourage and provide for professional development and professional networking for staff?
  - Encourage and provide opportunities to visit and learn about how other historic house museums fulfill their mission and their stewardship responsibilities?
- Are professional museum and preservation standards practiced at the highest level?
- Is the historic house museum recognized by the field, by its funders, by its audiences and/or stakeholders for excellence? Has it received awards or other tangible evidence of its excellence?
- Does it attract new audiences and new support for its activities on a regular basis?
- Do board members bring their families and friends to visit?
- Does staff bring family and friends to visit?

In Practice: General Lew Wallace Study and Museum—Crawfordsville, IN (www.ben-hur.com)

Mission: *The mission of the General Lew Wallace Study and Museum is to celebrate and renew belief in the power of the individual spirit to affect American history and culture.*

In Action: The Museum is located on three-and-a-half wooded acres on the site where General Wallace wrote his masterwork, *Ben-Hur*. Wallace's personal study has been lovingly preserved for over a century and contains original artifacts from every period of his life. His carriage house, also on the property, contains a state-of-the-art collection storage facility, an annually changing exhibit space, rentable meeting space, a catering kitchen, and a gift shop. This small site, with an annual budget of $120,000 and a staff of four, provides leadership at all levels of the museum profession. Their director is active in AASLH and other professional organizations, serving as the chair of the AASLH Small Museum Affinity Group Committee from 2004 to 2008, presently as chair of the Seminar for Historical Administration Alumni Committee, and as the 2010 AASLH Annual Meeting Program Chair.

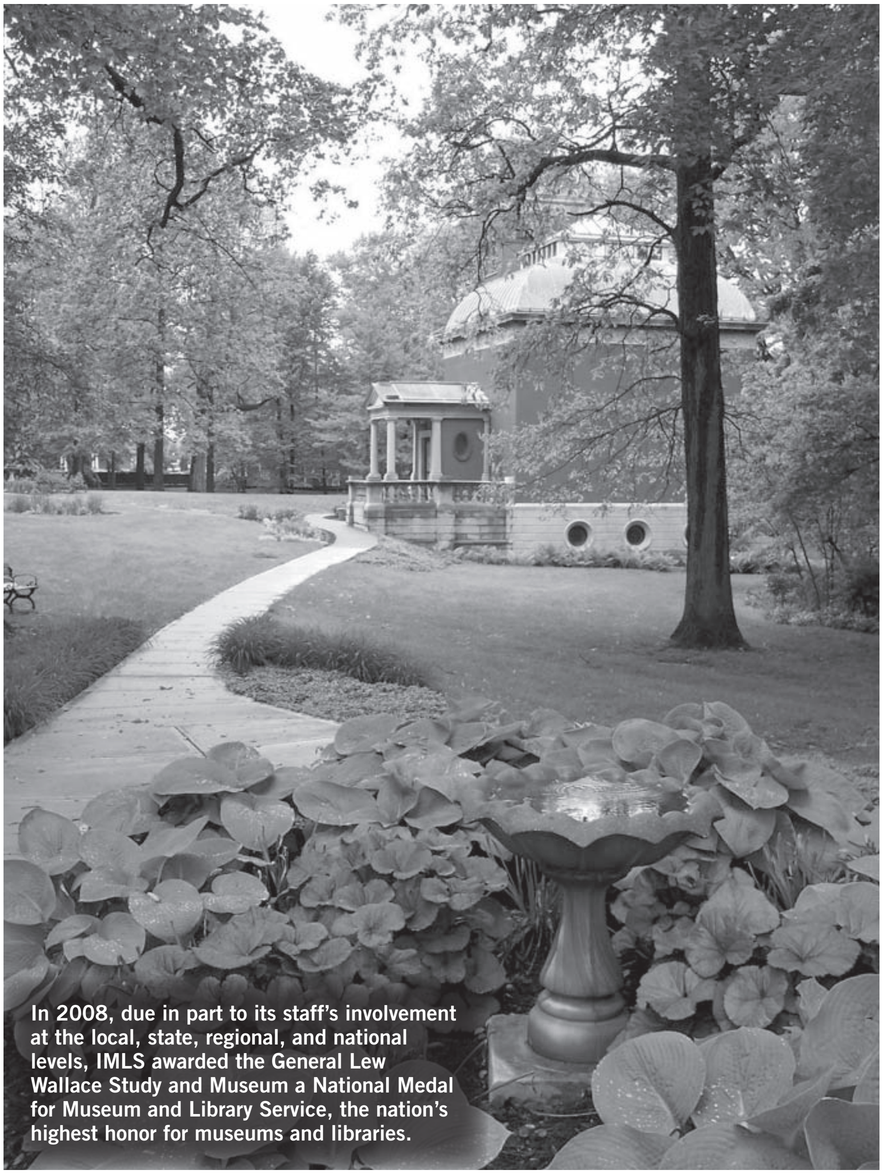
In addition to being involved on a local, state, and regional level with professional history organizations, the General Lew Wallace Study and Museum has been recognized nationally for its outstanding public programs. In 2008, IMLS awarded the museum a National Medal for Museum and Library Service, the nation's highest honor for museums and libraries. IMLS honored the institution for its Lew Wallace Youth Academy, which incorporates Wallace's life story into lessons in problem solving, creating art, and serving others; its Taste of Montgomery County event that created an economic engine for small businesses in the area and brought new people to the museum's campus to celebrate local food and music; and its participation in the public forum "Build a Better Downtown." Additionally, the museum has ensured the lasting legacy of General Wallace with the recent rehabilitation of his carriage house as an Interpretive Center complete with a state-of-the-art collections storage facility. Through exceptional educational programming, collaborations with local and state organizations, active collections care, and community development opportunities, the General Lew Wallace Study and Museum fulfills its mission to "celebrate and renew belief in the power of the individual spirit to affect American history and culture."

4. Sustainable historic house museum leaders embrace a culture of learning and a spirit of inquiry.

- Is there a culture of learning in the organization?
- Is ongoing scholarly research expected and supported?
- Are board members engaged in learning about the history, preservation, and activities of the historic house museum?
- Are board members engaged in continuous learning about their roles and fiduciary responsibilities?

In Practice: The Kearney Park Project of the Kearney Historic Site and the Fresno City and County Historical Society—Fresno, California (www.valleyhistory.org)

Mission: *To collect, preserve, interpret, and hold in public trust the records and artifacts that document the history of the people of Fresno County and the Central Valley region of California, to provide the community with educational opportunities through excellence in programs, exhibitions, and use of its collections, and to encourage and*


General Lew Wallace Study and Museum

In 2008, due in part to its staff's involvement at the local, state, regional, and national levels, IMLS awarded the General Lew Wallace Study and Museum a National Medal for Museum and Library Service, the nation's highest honor for museums and libraries.

promote the preservation and conservation of the community's historic and cultural resources with a commitment to an appreciation of our heritage and its place within our greater American heritage.

In Action: The Kearney Park Project of the Kearney Historic Site and the Fresno City and County Historical Society has a passion for California and its story, a desire to make history relevant, an interest in community building, and a commitment to create a center to address some of California's greatest challenges. The historic site includes five original structures and interprets the story of M. Theo Kearney, California's Raisin King.

Organized in 1919 predominately as a repository of the region's history, the Fresno Historical Society today houses an extensive archive that serves both academic and lay audiences. With a solid documentary foundation, the board's vision has evolved from building an urban museum in the mid-1990s to its plans for becoming an agricultural anchor today. Not rushing into planning meant that the leadership took time to educate itself, its staff, and its board members.

The staff arranged for three extensive week-long fact-finding excursions to historic sites and museums around the country, usually attended by twenty to twenty-five board members and spouses at their own expense, along with the director and one additional staff member. Staff carefully plans and orchestrates these junkets as learning opportunities to see what has worked and what has not at other cultural institutions. They prepare for each board member extensive research booklets containing pertinent information about each organization, its history, and governance. Meetings with staff and board members of the destination museums are set up in advance and are often the highlight of the experience. Being able to ask hard questions and learn from the many varied experiences of their host institutions has been invaluable in allowing the board to formulate a solid and viable strategy for the Kearney Park Project.

5. Successful historic house museums are connected to groups and individuals outside the organization who are leaders and decision-makers in their communities and in the professional field.

- Do historic house leaders regularly attend local events?
- Do board members belong to various local organizations? Do they use these connections to help the historic house museum?
- Do historic house leaders meet and correspond with elected officials?
- Do community leaders invite historic house leaders to participate in the activities of their organizations?
- Do historic house leaders and community leaders work together for common goals and agendas?
- Does the local news media report on the museum's activities and events?
- Do historic house leaders participate in regional

and national activities of the professional field?

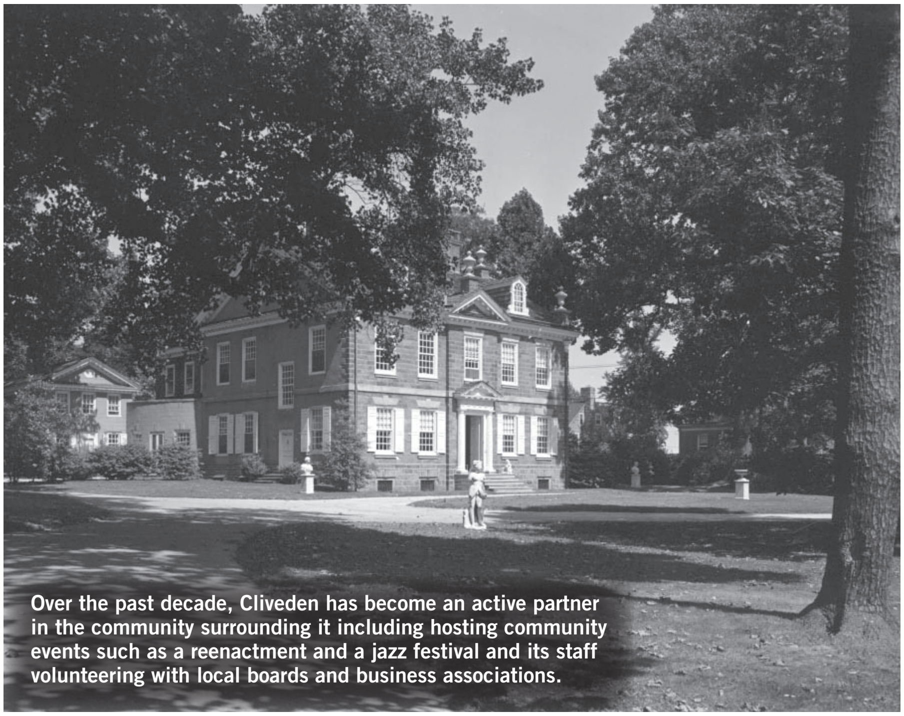
In Practice: Cliveden-Upsala of the National Trust for Historic Preservation—Philadelphia, Pennsylvania (www.cliveden.org)[3]

Mission: *To help people understand our shared history and motivate them to preserve it by providing access to the rich continuity of history and preservation in one community and family over time, and by offering direction and knowledge about preserving our built environment.*

In Action: Within the last ten years, Cliveden has moved from a traditional house museum to an active partner in the community and the region that surrounds it. Their strategy is to develop an approach that includes the highest museum and preservation standards for operating historic house museums and in-depth community engagement, resulting in economic revitalization. The site hosts several community-wide events on its grounds including the reenactment of the Battle of Germantown, jazz festivals, the police district's party for children, and a youth offenders program. The director serves on the board of the local community improvement association and other staff serve on committees of the business association.

In the last five years, leadership at Cliveden participated with several other community development corporations in urban planning for the area, and worked with multiple cultural, community, and neighborhood organizations to provide after-school programs, an esteemed young writers' program, and preservation workshops for homeowners in cooperation with the Preservation Alliance for Greater Philadelphia. Its current exhibit on the one hundredth anniversary of an important local bridge has received city-wide coverage and other media attention. Finally, board and staff attend many local community events and fundraisers and participate in national professional meetings.

Historic American Buildings Survey – 1972



Over the past decade, Cliveden has become an active partner in the community surrounding it including hosting community events such as a reenactment and a jazz festival and its staff volunteering with local boards and business associations.

6. Sustainable historic house museum leaders are proactive governors and managers of their organizations.

- Do all board members understand and adhere to appropriate roles and fiduciary responsibilities?
- Are all board members involved in fundraising and/or building endowment?
- Do all board members make an annual financial contribution to the historic house museum?
- Are financial records timely and up-to-date?
- Are other records up-to-date and timely?
- Do board members attend community events? Do they serve as ambassadors of the historic house museum?
- Is board leadership recruiting new younger members?
- Does board leadership adhere to term limits and by-laws?
- Are there succession plans for board members, committee members, and staff?

In Practice: James K. Polk Home—Columbia, Tennessee (www.jameskpolk.com)

Mission: *The mission of the James K. Polk Memorial Association is to operate, maintain, preserve, and restore the Polk Ancestral Home and properties, its grounds and appurtenances, and to perpetuate the memory of the eleventh President of the United States.*

In Action: This historic house museum has an annual budget of $230,000 and manages the home of the nation's eleventh president. Mrs. Polk's great-great-niece founded the Polk Association in 1924. Through its first fifty years, the board's vision and persistence helped sustain the Polk Home as a volunteer-managed site. In the 1970s, the Polk Association hired its first staff members and began the Polk Home's transition into a professionally operated museum. Since then, the board has emphasized governance, fundraising, and long-range planning in the site's operation. To achieve its goal of site expansion, the board initiated a capital improvement

Characteristics of Historic House Museums in Peril

The AASLH Historic House Committee developed the following checklist to help identify the characteristics of historic house museums in peril. Use this list to highlight areas in which your museum may need to improve.

Vision

- ☐ Most people involved with the historic house museum believe that "keeping the doors open" or maintaining the status quo is acceptable.

Mission

- ☐ Few people involved with the historic house museum know or understand the mission.

Board

- ☐ Most board members are unaware of their fiduciary and stewardship responsibilities.
- ☐ Most board members believe that in "keeping the doors open" or maintaining the status quo, they are fulfilling their fiduciary and stewardship responsibilities.
- ☐ Recruiting and retaining new board members is challenging.
- ☐ There is not a full complement of board members.
- ☐ There are few, if any, active board committees.
- ☐ There is no succession plan for board members and no one is willing to be president or chair of the board.
- ☐ No one on the board lives in the community served by the house museum.
- ☐ No one on the board attends community meetings or events as a representative of the historic house museum.
- ☐ There is no regular board performance evaluation, either by the board or by an outside evaluator.
- ☐ There is no ethics or conflict of interest policy.
- ☐ There is no strategic plan or the plan itself is just a list of ideas.
- ☐ There are no regular treasurer's reports.
- ☐ The board is not aware of any problems and/or is taking no action to remedy them.

Financial

- ☐ There are no checks and balances in use for handling financial transactions.
- ☐ There is no audit.
- ☐ There is an operating deficit.
- ☐ There is no endowment **or** the endowment generates less than 15% of the operating budget.
- ☐ There is no planned giving program.

Staffing

- ☐ There is high staff turnover.
- ☐ Staff are reviewed irregularly or not at all or only at the time of crisis.
- ☐ There are no performance expectations for staff or these expectations are not communicated to staff.

Characteristics of Historic House Museums in Peril

- ☐ Staff performance reviews are usually carried out by the president of the board without consultation with the other board members.
- ☐ There is no one on the staff from the community in which the historic house museum is located.
- ☐ There is no one on the staff who attends community meetings or events as a representative of the historic house museum.

Programs

- ☐ There are no historic structures reports for any of the historic buildings under the care of the board.
- ☐ There are no landscape or garden surveys (if the historic house has a historic landscape).
- ☐ There is no little or no regular maintenance of buildings or grounds.
- ☐ Repairs are performed on an emergency basis.
- ☐ Visitation has been declining over the last five to ten years.
- ☐ There are few school groups visiting the house museum.
- ☐ The historic house is open to visitors on a very limited basis.
- ☐ There has been no new research on the house for more than five years.
- ☐ There is little or no interpretation of the facts or story about the house's history.
- ☐ There is no connection made between the history of the house and current events or issues.
- ☐ Docents/guides tell the same story that has been told for many years.
- ☐ Routine tours are longer than one hour.

Collections

- ☐ It is difficult to plan programs because collections are poorly cataloged or are in disarray.
- ☐ Gifts to the collection are accepted without review of collecting policies or knowledge of the current collection.
- ☐ There are multiple numbering systems for the collection.
- ☐ There is no active review of the collection for possible deaccessioning.
- ☐ Collections records are not digitized.
- ☐ Collections are not safely housed or stored.

Communications

- ☐ Computer equipment is more than five years old.
- ☐ There is no website and/or no email address or email is checked irregularly.
- ☐ There is no current 4-color brochure.
- ☐ There is no signage or other means of finding the historic house museum.
- ☐ Membership is declining.

page 2 of 2

fund, requested a "right of first refusal" from adjacent property owners, and eventually purchased an 1880s church building to develop as an exhibit hall.

Board responsibilities and term limits are included in the organization's by-laws and policies. One-third of the officers rotate off the board annually. All board members contribute to Polk Home operations and special projects (the Association also counts volunteer work and shared expertise as contributions). Although Association members elect the officers, the board offers the nominees for office. To aid in succession planning, most incoming board members are Association committee members and active organizational volunteers or contributors.

The organization maintains thorough financial records. Financial recordkeeping is handled primarily by the Polk Home's director, the board's treasurer, and a hired C.P.A. Although the Association's written policies do not mandate it, the site's budget committee annually prepares a balanced budget. The Association's budget from any single revenue source seldom exceeds twenty percent of its entire annual budget. Therefore, a shortfall in any single category might prompt institutional belt tightening but would not hinder ongoing operations. And although the Association uses only the interest from its Capital Improvement and Endowment Funds for operating revenue, the principal from these restricted funds serves as an institutional safety net. Policies allow the board to withdraw capital funds for maintenance emergencies and endowment funds for any financial crisis that threatens the organization's existence.

7. Sustainable historic house museum leaders are proactive stewards of their buildings, collections, and landscapes.

- Does historic house museum leadership assess and plan for the best use(s) of the building(s) as part of its strategic planning process?
- As uses change, do historic house leaders obtain professional expertise in assessing structural requirements, code issues, and occupancy requirements?
- Are building spaces available to the public beyond house tours? Are they truly public spaces?
- Is there a space plan and master site plan for the historic house museum?
- Are there cyclical preservation, maintenance, and landscape plans for the historic property?
- Are adequate funds for preservation, restoration, and maintenance of the historic property budgeted annually? Are there budget allocations for replacement costs and for emergency reserve funds?

In Practice: Olana State Historic Site and The Olana Partnership—Hudson, New York (www.nysp.org and www.olana.org)

Mission: *The Olana State Historic Site is committed to the preservation of historic structures, designed landscape, site views, historical and artistic collections, and the archeological resources of the Olana estate. This historic estate is maintained for public enjoyment and passive recreational use in such a manner that Olana's natural, historic, visual, and cultural resources shall not be endangered or compromised. Olana interprets its collections and the history of its property to the broadest possible audience. The mission of The Olana Partnership is to inspire the public by preserving and interpreting Olana, Frederic Church's artistic masterpiece.*

In Action: The Olana Partnership works in concert with staff at the Olana Historic Site to leverage preservation and funding opportunities for the restoration of Olana and to advocate for the site and its landscape.

In 1971, The Olana Partnership, a not-for-profit group, was established to assist the State of New York in raising funds for the preservation of Olana. This friends group implemented traditional methods of fundraising until the mid-1990s, when the group began to attract new board members who brought a diverse array of skills and experiences to the Partnership. In partnership with the Olana Historic Site, it raised funds to hire outside expertise to develop, support, and implement an ambitious strategic plan.

Since that time, The Olana Partnership has supported two part-time curatorial positions, and a part-time librarian and archivist. It has leveraged more than $12 million for restoration and conservation of the house and the collections. The Partnership has a budget of $1 million and supports six full-time staff, including its own executive director. In the last few years, it has advocated successfully for the site, its 240 landscaped acres and its viewsheds.

From its earliest beginnings, excellent stewardship has been a hallmark of both the Olana Historic Site and The Olana Partnership. The site's first director was a graduate of the Cooperstown Museum program. Since then, all staff, volunteers, and others associated with the site endorse and encourage the value of excellence in all of its preservation and program activities. Those involved with Olana consider their involvement to be an honor of the highest order, based on the sense of place that permeates the site.

8. Sustainable historic house museums are interpreted in innovative and creative ways that extend well beyond the traditional house tour. Sustainable historic house museum programs are developed in conjunction with new sources of revenue.

- Are programs based on a central idea or hypothesis that links past to present and connects the historic house museum to the world beyond its gates?
- Does interpretation build on and enhance the sense of place unique to each site?
- Are programs presented in different platforms (e.g.,

Web, audio, exhibit, interactives)?

- Are programs multi-disciplinary in nature (e.g., poetry readings, plays, education programs that address multiple curricula standards, dances, science projects that include historic elements)?
- Do programs charge adequate admission, produce products, or provide other sources of earned revenue?

In Practice: Lower East Side Tenement Museum—New York, New York (www.tenement.org)

Mission: *The Tenement Museum promotes tolerance and historical perspective through the presentation and interpretation of a variety of immigrant and migrant experiences on Manhattan's Lower East Side, a gateway to America.*

In Action: For more than twenty years, the Lower East Side Tenement Museum has developed stories based on the lives of the inhabitants at 97 Orchard Street. The interpretation is highly researched and based on immigrant issues that are of concern to Americans today. The museum receives more than 140,000 visitors annually who come from fifty states and twenty-eight foreign countries. Its website receives more than 300,000 hits per year.

The work of the museum is designed to meet the needs of current visitors and local audiences including new immigrants. Staff screen all museum programs for the following: visitor interest and connection, fit with school curricula, financial sustainability, and historical accuracy. The museum makes available classes in English-as-a-second language and provides programming related to the topic of immigration. The museum earns revenue primarily through retail sales and visitor admission (general adult admission is $17). In this past year, visitation has increased more than twenty percent.

The museum's programming is diverse, varied, and cross-disciplinary. One of its web-based projects, *The Digital Artist in Residence*, awards virtual residencies to emerging and established artists for exploration of contemporary immigrant experiences. The museum provides work and display space for these artistic works.

Since its inception, the museum has involved itself in many productive partnerships on the local, national, and international level. Each partnership promotes recognition of the museum and its programs, while attracting new visitors and new support for its work. Major individual donors, earned revenue, and some program grants provide a majority of funding for the museum's programs.

9. Sustainable historic house museum leaders are strategic in their thinking and in their activities.

- Do historic house museum leaders understand the difference between a long-term and a strategic plan?
- Does the strategic plan include ideas and a test of financial feasibility for each idea?
- Has the board made choices about which ideas to pursue and which ones are not feasible?
- Does the strategic plan include a budget, timeline, assignment of responsibility, and workplan for each acceptable idea?
- Do members and other stakeholders have input into the strategic plan?
- Do historic house leaders involve neighbors and community decision makers in the planning process?
- Does the planning process include evaluations and feedback from audiences, outside consultants, other professionals in the field, funders, or others outside the organization?
- Is there an independent facilitator for the planning process?

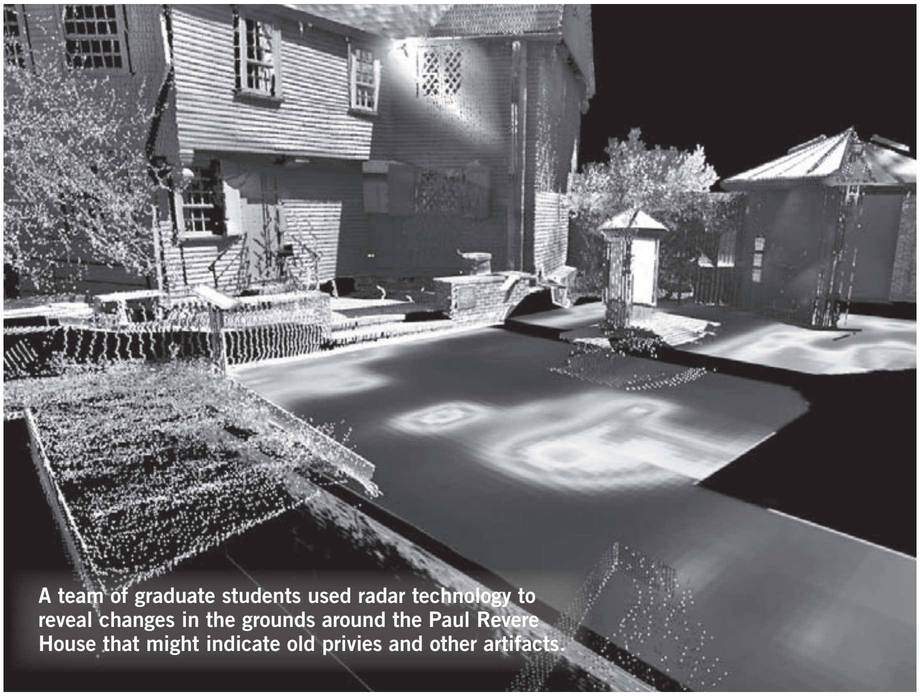
In Practice: Florence Griswold Museum—Old Lyme, Connecticut (www.florencegriswoldmuseum.org)

Mission: *The mission of the Florence Griswold Museum is to promote the understanding of Connecticut's contribution to American art, with emphasis on the art, history, and landscape of the Lyme region.*

In Action: In the last ten years, the Florence Griswold Museum has planned and implemented significant changes in its approach to visitors and their needs and interests. Leaders based all of these changes on comprehensive strategic planning that included participation by a diverse board, local community leaders, and sustained executive leadership over the course of the project. Staff worked with other outside experts on specific focused projects to ensure the highest level of planning. Beginning with a three-day symposium that included experts in several areas of historic site management and interpretation, the project has included restoration of the 1817 National Historic Landmark Florence Griswold House, a boarding house for the Lyme Colony of Artists.

Senior staff worked with outside consultants on focused aspects of the project and incorporated strategic planning for a larger visionary plan and capital campaign as well as for more concrete programs and events. The museum moved all of its ancillary functions like restrooms, meeting space, and offices out of the house and relocated them to other buildings on the property. An art gallery was built to accommodate a changing exhibition program and now the historic house offers a consistent and compelling visitor experience with seasonal changes to the interiors. Tours are self-guided, a major change that took time for docents and staff to agree on, but docents now are delighted with the new role they have that includes facilitation of conversations about the house and the art contained within it.

Several challenging decisions were met with some initial resistance. Yet in time, staff accommodated and embraced all strategic changes. Today, the museum's culture reflects the importance and continuation of



A team of graduate students used radar technology to reveal changes in the grounds around the Paul Revere House that might indicate old privies and other artifacts.

UMass Boston and Harry R. Feldman, Inc.

strategic planning for most of its activities. Visitors rate their experiences considerably higher than they did in the past and report them as much more meaningful. A balance of federal, state, private, and individual giving has supported the planning and the implementation of this major change.

10. Sustainable historic house museums that are well prepared for the future adapt current technologies to enhance their understanding of their resources, expand public access, and improve efficiency and effectiveness.

- Does the museum have computers and email addresses for each staff member? Are computers networked?
- Do the computers include software to facilitate word processing, spreadsheets, and databases for collections, membership, and donors?
- Are tours and/or other educational programming and collections information available electronically? Does the museum maintain a website and is it updated frequently?
- Does the museum use listservs, blogs, wikis, and/or electronic newsletters to communicate with members and supporters?
- Does the museum partner with technological-savvy partners who can extend uses and understanding of advanced technologies?

In Practice: Paul Revere Memorial Association—Boston, Massachusetts (www.paulreverehouse.org)

Mission: *The Association actively preserves and interprets two of Boston's oldest homes. It provides our increasingly diverse audience with remarkable educational experiences based on historical issues and social history themes relevant to our site, our neighborhood, and Boston from the seventeenth through the early twentieth century.*

In Action: In preparation for its centennial anniversary, the Paul Revere House began planning an addition to accommodate its 250,000 annual visitors. First, the Association purchased Lathrop Place, an adjoining site. Next, the staff and board developed a master plan and comprehensive land survey of both sites. This included exploring the entire historic complex using laser technology to explore what is above and below ground.

The director contacted the coastal geology and geophysics department at the University of Massachusetts, Boston, and asked if there was interest in exploring the site. An enthusiastic response led to a team of graduate students pulling a radar skid plate over the entire site, revealing changes in the ground that might indicate old privies and other artifacts. At the same time, the president of a surveying company contacted the executive director and offered to do a free survey. The surveying team used three-dimensional laser technology to provide photographs of every inch of the house and grounds in their entirety. Now planning, design, and construction can begin with a never-before understanding of every aspect and dimension of the house and grounds, with a vision of what is at least ten feet below ground.[4]

11. Sustainable historic house museums are branded, promoted, and marketed using consistent graphic languages.

- Is there a marketing plan?
- Are there funds for advertising?
- Are there funds for distribution of rack cards and other marketing materials?
- Is the efficacy of marketing materials tested?

In Practice: Historic Hudson Valley, New York (www.hudsonvalley.org)

In Action: In the early twenty-first century, the marketing effort at several historic sites in the Hudson Valley was chaotic. Other than Kykuit and Sleepy Hollow, most were relatively unknown and without any branding or identity. Each one employed different messages and different graphics. Eventually, the marketing director at one site decided to work with the other sites to establish an identity and a consistent graphic look that could be applied by all the sites. Each site would speak with a consistent voice and develop its promotional materials using one design. The collaborative group of sites would be known as Historic Hudson Valley and the leadership at each site would provide full backing and support for these marketing efforts. Soon, the collaborative decided it would design marketing materials using the best resources and staff from each site (e.g., whichever site had the best website would provide the basis for the group website). The first product the collaborative produced was a coffee table book of each site with accompanying text and full color. (Individually, no one site could develop, print, or distribute a book like this and no one site could sell enough books to net a profit.)

Later efforts included a group website, a common logo, consistent-looking rack cards and websites, and a series of templates that could be used by any site or adapted by any graphic designer to create more materials. The key to success for this marketing program was rigorous enforcement of all marketing materials, including the placement of logos, font sizes, colors, and other graphic elements used by each individual site.

Conclusion:

In examining the issue of sustainability for historic house museums today, it is clear that those best suited to thrive in spite of challenges now and in the future are those that possess many of the characteristics described in this leaflet. The AASLH Historic House Committee intends that this tool will be used by historic house museum leadership who want to attract new audiences, new support, and find new purposes for their missions and historic properties. This tool can be used to quickly assess the qualities and values that are part of the culture of your historic house. It can help an organization to identify what might make a difference in organizational thinking that will lead to thriving (as opposed to only surviving) organizations. Depending on the state of your historic house museum, it may serve as a wake-up call for board members or staff leadership who can learn what the warning signs are for historic houses in peril. If your organization chooses to address some of its challenges, this tool can serve as a guidepost or benchmark along the road to progress. As organizational thinking and learning are progressing, this document can serve as a quick tool for evaluating progress.

For more information about this project and others from the Historic House Museum Affinity Group, visit www.aaslh.org/hhouses.htm.

AASLH Historic House Museum Affinity Group Committee:

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Kendra Dillard, Governor's Mansion State Historic Park, Sacramento, CA

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[1] For information on AASLH's Standards program, sponsored by IMLS, please see www.aaslh.org/IncrementalStd.

[2] See the AASLH Historic House Committee webpage at www.aaslh.org/hhouses.

[3] See David W. Young, "The Next Cliveden: A New Approach to the Historic Site in Philadelphia," *Forum Journal* 22, no. 3 (Spring 2008): 51-55.

[4] To look at the laser photos online and view a video, go to www.bostonglobe.com and call up "A Look into the Past, with Laser Precision," 19 May 2008.

[5] Silberman acknowledges the support of the William Penn Foundation, The Pew Charitable Trusts, and the Heritage Philadelphia Program for their support of the Alternative Stewardship project, which helped to inform her work developing this leaflet.

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House History: Some Assembly Required

By Mary Warner

Shelter is a critical part of the human survival triad, taking its place beside food and clothing. The necessity of these items to the human experience makes them easy to overlook in terms of preservation, yet museums find ways to preserve representative examples of the food and clothing portions of the triad. Recipe books, dishes, utensils, cast iron stoves, flour sacks, and even food in the form of canned goods have been collected. Clothing, too, gets its due within museum holdings, being perhaps the easiest of the survival triad to save.

Shelter has not fared as well. The ubiquity of shelter, specifically the human domicile commonly known as the house, has been one factor in society's long-term neglect of methodically collecting its history. Another is size. How do you cram a house into a museum building without turning the house itself into a museum? And while there might be arguments about the historical worthiness of one house over another, the fact is that all houses contain history, whether mundane or exciting. If the thought of cramming one house into a museum brings on a fit of apoplexy, the idea of squeezing an entire community worth of houses under one roof is sure to induce a coma.

Fortunately, it is not necessary to bring or transform houses into museums in order to preserve their histories. Representative documentation will suffice. Unfortunately, the public has not considered systematic and consistent documentation important until the last few decades, so some assembly is required in order to compile the history of most houses. While the sources of house history may not be obvious, plenty of places provide clues. Investigating these sources in a logical fashion helps prevent house history assembly from becoming overwhelming.

The following is written for the house owner, who will have access to key resources, most notably, the house itself. Historical organizations can use the information to assist community members in documenting their houses or as a guide to systematically gathering the histories of houses in their communities. This process may also be adapted to research the histories of buildings other than houses.

Two Main Aspects & One Critical Piece of Information

When it comes to house history, there are two main aspects to analyze:

1. The history of the structure
2. The history of the owners and/or occupants

Remembering these aspects is vital to keeping your research organized and manageable. Naturally, these aspects overlap, but each involves examining different types of resources. If you clearly define which aspect you study at a given time, you will minimize potential distractions and your search will proceed more smoothly.

Before crawling into the nooks and crannies of house history research, you need one critical piece of information—the address of the house or the property description. If you live in a city, your street address will suffice for most of your research, although there is a longer property description attached to your street address. (It looks something like this: Lot 8, Block 12, Original Plat.) If you own a large piece of property within a city, encompassing more than one lot or block, use the description of the property on which the house sits.

If you live in a rural area, one outside the geographic bounds of a city, your property description will follow the Township-Range-Section formula of the Rectangular Survey System and will look something like this: Township 130 North, Range 31 West, Section 7. This may be abbreviated to T130N, R31W, S7. If you don't own an entire section in a particular Township and Range, the description will be narrowed further by the addition of a directional marker (N, S, E, W, NE, SE, NW, SW) and the portion of the section you own (1/4, 1/2). There may also be a lot number associated with the property description. For example, a more complicated rural property description might be T130N, R31W, S7 (Lot 11 & S 1/2 of SW 1/4).

The House as an Artifact

Just as museum professionals examine the artifacts in our collections for clues as to their past use, you can study your home for information on its history. The house is, indeed, an artifact, a really big artifact. Because of its size, it requires a methodical investigation. Consider these three areas:

1. The interior
2. The exterior
3. The neighborhood

Examine them in any order, but as you make your observations, take notes about what you find rather than leaving the details at the mercy of your memory. Draw sketches of the floor plan, wall elevations, and interesting details, or, if it is easier, take photographs. While this may seem to be a lot of work, photographs can do double-duty as documentation for insurance purposes in case you ever have to file a claim. Be sure to make duplicates of your photos (print version or saved on a compact disc or flash drive) and put the copies in a safe place away from the house.

The Interior

Take a look at the inside of the house. Move from room to room and ask yourself these questions:

1. How many floors or levels are there? How many rooms are on each level and what are their uses? What are the dimensions of each room (include ceiling heights)? What is the total square footage of each level and of the entire house?

2. What floor materials and wall treatments have been used in each room? How many windows and doors are in each room? Which walls are they on

Photos from the collections of the Morrison County Historical Society

Older house photos typically show family members posing in front of the house. This photo shows outbuildings, which are part of the history of the house. There's even a birdhouse on a pole on the far right of the photo. Unidentified home in Swanville, MN, December 17, 1900.

(north, south, east, west)? For kitchens, bathrooms, and other rooms, what fixtures are included?

3. What utilities are in the house? Is there a heating and/or cooling system? If so, what kind? What is the water source—private well or municipal system? Is there a water heater? How are sewage and waste water handled—through a municipal sewer system or an onsite septic system?

4. How is electricity supplied? Does it come from an electric company or is it generated onsite? If the latter, what is the source of power (solar, wind, etc.)? Is there a fuse box or a circuit breaker panel? How many outlets are in each room?

5. Is there a laundry area? What sort of equipment is it set up to handle (i.e., gas or electric dryer, etc.)? Are there other fixtures, such as a sink, in the laundry area?

6. List any special features in the house (i.e. pocket or swinging doors, hidden rooms, unusual trim or doorknobs, built-in furniture, fireplaces, a fancy staircase or a secondary staircase, stained glass windows, etc.).

7. Is there evidence that anything has been changed in the house? If so, what?

These questions will help you pay close attention to what is going on in your house. If you have hardwood floors and fancy trim throughout the house, it tells you something about the economic standing of the people who had the house built. If you have hardwood floors and fancy trim on the main level of the house, but the floors upstairs are made of pine planks and the trim has no decoration, this may be a clue about the original owner's financial means. It also indicates that the main floor was the showplace reserved for entertaining and the upstairs was meant for the occupants only.

Similarly, wall treatments tell a story. If your entire house, save one room, has plaster and lath walls, and that single room has 1970s-era dark paneling, you've got to ask why. Wall treatments like paint color and wallpaper will help you to date interior design trends, especially if you examine several layers of treatments.

In looking at utilities, each of these has a natural lifespan and has to be replaced eventually. If you have a fuse box instead of a circuit breaker, you may be able to gauge the era of the fuse box with some research. There might even be a label on it with the date of installation. If your house was built before your community had electricity and the fuse box is original to the house, you'll be able to tell when your house first had electricity.

Photos from the collections of the Morrison County Historical Society

The history is in the details. This stained glass window was designed by Martin Scott, who owned one of the brickyards in Little Falls, MN. The window is in a house on West Broadway, Little Falls, MN, 1987.

Counting outlets per room may seem pointless, but if you have only two outlets in an entire upstairs area that contains several rooms, those two outlets tell you that your wiring is old. Current electrical code calls for an outlet every so many feet, depending upon the type of room. The National Electric Code was first published in 1897 and has been regularly updated since that time. Theoretically, you could date your electrical system quite precisely by looking at how it matches past code.[1]

Your electrical system is not the only part of your house that was installed to code. All of the utility systems, including the plumbing and heating, were constructed according to whatever the current code was, with building codes dictating how the house itself was built. The purpose of these codes is to mitigate hazards, like fire or poor structural integrity. National associations update codes at regular intervals, but these may or may not be adopted by local municipalities.

Some of these observations about code and construction are easier to make if you're in the middle of remodeling and have the walls stripped down to the studs. You will be able to see whether the wiring is the old-fashioned knob-and-tube variety or the current Romex®-coated wiring. It will become apparent whether a wall was altered in order to install pipes for plumbing and you can examine its framing, the "bones" of the building. In an old house, any two-by-fours used for framing will actually measure a full two inches-by-four inches, whereas in new construction, a two-by-four measures 1 ¾ inch-by-3 ¾ inch. You'll be able to see whether balloon framing was used, wherein the framing runs from the ground floor up to the second floor without a plate between floors.

If you're lucky enough to be living through a remodel while researching the history of your house, keep notes of the process and what you discover. Is there anything hidden in the walls, like pennies, newspapers (check dates), or horseshoes? Did you find a door or window that was covered over? Is there evidence of previous remodeling endeavors?

The Exterior

Once you have thoroughly investigated the interior of the house, do the same with the exterior. Write down the materials used for siding, roofing, stairs, and foundation. Note the number of windows and doors on each side of the house and their placement, shape, type, and other pertinent details. Pay particular

Photos from the collections of the Morrison County Historical Society.
Photo by Mary Warner, October 2007.

A house's surroundings help to put it into context. These practically identical houses were built in Little Falls, MN, as worker houses for a local industry.

Photos from the collections of the Morrison County Historical Society.
Photo by Mary Warner, October 2007.

This Greek Revival style house is the oldest house still standing in Little Falls, MN. It was built by doctor and carpenter Zachariah Jodon in 1858. Because a previous owner was interested in both renovating the house and collecting its history, this is one of the best documented houses in the city.

attention to the special features of your home, such as porches, columns, towers, chimneys, decks, railings, the shape of the roof, porticoes, walkways or breezeways, decorative embellishments or brickwork, attached structures, signs of remodeling, distinctive local materials, etc. These may be the key to figuring out the architectural style of your house.

Even if you did not take photographs of the interior, you will certainly want to take exterior shots. Use them as a point of comparison in researching the architectural style of your house through architecture resources at your local library, history center, or on the Internet. While photographing the house, do not limit yourself to views of the front or "pretty" side of the house. Take photos of every side, plus close-ups of special details and wide-angle views that show how the house is situated on the property.

The Neighborhood

Houses, no matter how remotely located, are part of a larger environment or neighborhood, even if the nearest neighbors are miles away. Someone built your house on this particular spot for a reason, giving significance to this place. Take a good look around your property and its natural and built resources in order to deduce why your house is where it is.

1. How is the house situated on the property? Is it near a main road, tucked back on the property, or practically hidden? Is it close to a natural feature, such as a stream?

2. Are there other structures on the property? If so, where are they in relation to the house? What are their uses?

3. Does it appear as though the property was used for something other than a residence, such as a farm or business? If so, what was its alternate use? (You may not be able to answer this by observation alone, but it may become apparent as your research stretches to other sources.)

4. Describe other features—either natural or built—on the property (i.e., gardens, driveways, garages, sheds, fences, swimming pools, streams, woods, fields, rock outcroppings, archaeological sites, etc.). Is there any evidence that other structures formerly existed on the property, such as old foundations or concrete slabs?

5. How does your house fit within the neighborhood beyond your property? Does it blend in or stick out?

If your house is in a city, these comparisons can reveal development patterns. For example, if your house is constructed in a style similar to the other houses on your block, they may have all been built around the same time, or there is a strong local zoning ordinance that requires the houses in your neighborhood to follow a particular style. The other alternative, especially if the houses are identical to each other, is that they were built as part of a planned development or as company houses for the workers of a local business.

If you have a relatively new house with vinyl siding and your neighbor to the north has a similar house, but your neighbor to the south has a brick Victorian, there's a good chance that your property may have originally belonged to whoever used to own the Victorian; the land having been subdivided at some point. Even the size of your lot, whether spacious or skimpy, will give you clues as to the history of your house in relation to the community.

Emotional Resonance

Now that you have examined your house as an artifact, turn your attention to the people who have been associated with your house. Human beings are the source of a house's emotional resonance, which is what causes us to care about the history of our homes. Anyone with a significant connection to the house, whether the architect, contractor, plumber, owners, or occupants, will imprint his/her own history and emotional life on the house, giving it a deepening character over time.

Curiosity induced by emotional resonance will have you asking: Who designed this house? Who crafted it? When was it built? Who lived here? What were the circumstances of their lives? What happened in this house?

In order to answer these questions, expand your research to other sources.

What You Know

When it comes to the history of the people of your house, start with what you know. If you have lived in the house for any length of time, your own association with the structure is part of its history. Do not dismiss your family's history with the house because you assume that history is something that happened before you took ownership. Whatever happened yesterday is now history and, therefore, may be of importance to the task at hand.

In noting your history with the house, think about what future owners might want to know about you. When did you and your family move in? List everyone who lives in the household and their relationships to one another. From whom did you buy the house? Who owned it before you? How much did you pay? What changes have you made to the house or property and when did you make them? Recall special events that have taken place in the home, weddings, deaths, births, anniversaries, interesting visitors, large projects undertaken onsite (inventions created, books written, etc.). Include dates of the events, plus pertinent details. If you or another family member keeps a journal, use it to enhance your recollections.

With even a marginally good memory, the task of writing out your own relationship with your house could keep you busy for a long time. Do not feel you must write a full narrative of everything all at once. Add information during the course of your research. Even a sentence or two, as opposed to a complete essay, can be valuable to a future homeowner or researcher.

While you reminisce, sift through your personal photo collection looking for any past pictures of your house. It is common to not find any photos in which the house is the primary focal point. Typically, houses served as the backdrop for snapshots of people or events. If a significant portion of the house appears somewhere in a photo, study it closely to see if there have been any changes between then and now. You may also find value in comparing past furnishings with what you have today.

Investigating the Abstract

In searching for the previous owners of your house, the best place to begin is with the abstract. If you own the house you are researching, the abstract is the bound set of documents you received after you purchased the house. The abstract should be kept in a safe place because it costs a tidy sum to replace if it is lost or destroyed. The abstract shows all of the owners of your property, plus any legal proceedings that have taken place in relation to your property from the beginning of its recorded history. Because it shows the history of the property, but not the structures on the property, you will not necessarily be able to figure out when the house was built or remodeled from the document.

Rather than carry the abstract around while doing research, make notes from it, including the names you find, the types of legal transactions (mortgages, liens, etc.), and dates. If, in perusing the abstract, details about the history of your house, like the construction date or the name of the family who originally built it, come to mind, write these down, too, because it's time to head out into the wide world to find out more about your home, sweet home. Remember to take your notes and photos with you.

Historic House Research Websites

There are some specific house-related websites with which you should become familiar.

The National Park Service **(www.nps.gov)**, through the U.S. Department of the Interior, has a number of valuable Web pages related to building preservation, including a link to a list of each State Historic Preservation Office (SHPO) in the United States. Further, the NPS website contains a list of over forty articles from its *Preservation Briefs* series that discuss all manner of building preservation issues.

The National Trust for Historic Preservation **(www.preservationnation.org)** is a private nonprofit whose mission is also related to the preservation of historic places. Its website includes a page of frequently asked questions for homeowners interested in preservation issues.

If your house was built by a notable architect, one of the architectural archives found throughout the United States may be able to offer assistance.

The Avery Architectural & Fine Arts Library **(www.columbia.edu/cu/lweb/indiv/avery/)**, part of the Columbia University Libraries, has compiled a list of architectural archives, as has Carnegie Mellon University **(www.library.cmu.edu/Research/ArchArch/netsites)**.

The Sanborn Map Company is still in business **(sanborn.com)**. Rather than creating fire insurance maps by hand, the company has moved into the arena of digital mapping. Digitized historic Sanborn maps can be found online through a subscription service called *ProQuest.* To order a subscription, contact Environmental Data Resources, Inc. **(www.edrnet.com/sanborn.htm)**, which works with The Sanborn Library, LLC, to provide the maps.

Photos from the collections of the Morrison County Historical Society. Photo by Dan Hovland, August 18, 2003.

When taking photos for your house history, try to get views of each side of the house. This photo shows two sides of the Axel & Carrie Borgstrom House in Upsala, MN.

Photos from the collections of the Morrison County Historical Society. Knut Elvig House, Little Falls, MN. Photo Mary Warner, October 2007.

Little Falls is known for a distinctive local building material. Many of the homes and downtown businesses have a yellow brick veneer. When researching your house's history, look for evidence of local building materials.

Outside Research

There are several community resources available that include information on your house's history. You do not have to explore them in any particular order. Start where you like and be prepared to revisit a resource if needed.

One resource, right underfoot, could prove to be priceless—your neighbors. Long-term residents of your neighborhood can be especially helpful in providing you with information about your house and its past occupants, but don't discount short-term residents. Being new to a neighborhood might make short-term residents more observant about details that long-term residents overlook. Either way, what you uncover during conversations with the neighbors may make you thankful for their stereotypical nosiness.

Several government resources can help you tease out information about your house. These include the county recorder's office, the county assessor, the county planning and zoning office, and your city's planning and zoning office. Along with keeping vital records showing births, deaths, and marriages, a county recorder's office also contains land records. Like the abstract, these records track property ownership, not structures, but you may be able to deduce dates for construction based upon when mortgages were taken out. The records will tell you who owned your property and how much they paid for it, but won't give you information on renters.

The county assessor's office evaluates property values in order to determine the amount of property tax paid each year. As this is the revenue upon which county and local municipalities operate, current data should be readily available. Ask how to access archived tax assessments. Over time, the manner of property assessments changed, so you will likely find different information within the assessments from year to year. Details such as construction and remodeling dates, type of construction, materials used, square footage, and other buildings on the property may be recorded. Construction dates will not necessarily be correct, so you'll want to confirm this with other sources.

County and city planning and zoning offices issue building and remodeling permits containing a description and/or drawings of what was involved with a construction project. County offices deal with permitting for homes outside of city limits, whereas city offices issue permits for houses within city limits. The county office may also issue septic system permits, so if you're curious about your system's installation, this is the place to ask.

Government planning and zoning offices have different schedules for archiving past permits, with some offices keeping them for decades and others purging them after so many years. If there are no longer permits on file for your house, you might be able to find a discussion of building permits within the past minutes of the city council or county board. This is tedious work, especially if you are unsure of the year of construction, so saving this as a last resort is a wise move.

What's Available at Local Historical Organizations

Your work would not be complete without a visit to your area historical society or research center. County and city historical organizations tend to collect a wide range of materials. Knowing what to ask for will make things easier for you and the organization's staff. Unless you are trying to retrieve a specific piece of information, this is not going to be a one-stop shop, so plan to return from the outset.

If the area historical society caters to genealogists,

Online Resources for Building Codes

International Code Council develops and updates the International Building Code and other related codes, **www.iccsafe.org/news/about**.

National Fire Protection Association develops and updates the National Electrical Code along with other fire safety related codes, **www.nfpa.org/index.asp**.

International Association of Plumbing and Mechanical Officials (IAPMO) develops and updates the Uniform Plumbing Code and Uniform Mechanical Code, **www.iapmo.org/Pages/splash.aspx**.

there should be family information available for you to peruse. The names you gathered from the abstract and/or county recorder's office serve as your master research list. The historical organization may have oral histories, family history books, journals, scrapbooks, and other miscellaneous data that mentions something about your house in relation to those who lived there. Pedigree charts, census records, city and county directories, and phone books can help you to piece together any of the home owners' family members. The census records may also reveal that someone unrelated to the owner was staying in the house during a particular census. Could this have been a renter, a boarder, a mooching friend, or is there a direct familial connection between the guest and home owner?

Local historical organizations are likely to have a collection of the area's plat maps, typically bound in book form. Comparing plat maps over a range of years shows you not only the past owners of your property, but neighboring land owners, as well. It is not unusual to find close relationships between neighbors, particularly those that might have led to matrimony.

In addition to plat maps, the historical organization may have Sanborn Fire Insurance Maps™. These maps, produced by the Sanborn Map Company for over 12,000 cities and towns in the United States between 1867 and 1970, focus on the structures within a city and give details as to the use of buildings, their measurements, exits, number of stories, construction materials (brick, stone, iron, etc.), outbuildings, and other information related to fire risk. Sanborn Map Company employees were meticulous with their drawings, so these maps show highly accurate footprints of structures, streets, and town layout. If Sanborn maps are available for more than one year, comparisons between them will be instructive.[2]

With a large dollop of luck, your historical society will have documentation that is specific to your house, items such as photos of the house and/or its past owners, general architectural surveys in which your home is listed, or blueprints. If your house is listed on the National Register of Historic Places, a copy of the form and supporting documents used to achieve the designation may be on file. Perhaps staff or a previous owner already compiled information on your house and it is patiently awaiting your arrival.

While you may be tempted to focus solely on research about your house, do not discount general history books concerning the area. These will help put your home into the context of the larger community. Maybe there was a local building trend or architectural style your house followed, or a particular construction material that was endemic to the community. Perhaps one of the owners was an active leader in town, and local history books are littered with his/her name. Staff of the historical organization may know some of this information off-hand and should be happy to share it.

If you weren't able to find past records when visiting the aforementioned government offices, it behooves you to inquire about whether they have been archived at your local historical center. Sometimes past tax assessments, minutes of the county board or city council, and similar documents have made their way to such organizations for safekeeping.

When you've exhausted all of the obvious house history resources within the organization, there's one more you can turn to—the local newspaper. This one is a long shot in terms of gleaning information about the construction of your house, but it can pay off beautifully if you have the fortitude to wade through page after page of newsprint. While most newspapers today do not report on new house construction, early newspapers sometimes devoted articles to specific home construction projects, particularly if the owner was well known. Having an accurate date of construction is critical to reducing the amount of time needed for this task.

Online Resources on How to Do House History Research

There are plenty of good articles online about how to conduct house history research. Each of them has a different focus from this article and might lead you to resources that aren't covered here.

House History Checklist, Kansas State Historical Society, **www.kshs.org/genealogists/househistorychecklist.pdf**.

Your House Has A History: A Step-by-Step Guide to Researching Your Property, City of Chicago, Commission on Chicago Landmarks, **www.cityofchicago.org/Landmarks/pdf/Your_House_Has_A_History.pdf**.

Researching the History of Your House: A Bibliography Prepared by David L. Langenberg, University of Delaware Library, Local History Committee, History Section, R. U. S. A., **www2.lib.udel.edu/subj/hist/resguide/house-bib.htm**.

Drafting a House History, Compiled by Barbara Bezat and Alan K. Lathrop, University of Minnesota Libraries, 1979, **http://special.lib.umn.edu/manuscripts/HSEHIST_Complete.htm**.

House History Aid, Indianapolis Marion County Public Library, **www.imcpl.org/resources/guides/family/househistory/househistoryaid.html**.

How To: House History, Minnesota Historical Society, St. Paul, MN, **www.mnhs.org/localhistory/bldghistory/househistory.htm**.

Online Resources

By this time, you might think it strange that this article has barely touched on using the Internet for house history research. There's a good reason for that. While the growth of general online content continues

Blogs About Historic Homes

If you would like to start a blog in order to share the history of your house, or the process of discovering its history, here are some existing blogs related to house history you can look to as examples.

National Trust Historic Sites Weblog **http://historicsites.wordpress.com**.

Rebuilding Place in the Urban Space by Richard Layman, Washington, D.C., **http://urbanplacesandspaces.blogspot.com**.

Time Tells: Vince Michael on history, preservation, planning, and more, Chicago, IL, **http://vincemichael.wordpress.com**.

CasaCARA: Old Houses for Fun and Profit by Cara Greenberg. Tagline: "Real estate, architecture, historic preservation, & interior design, from Brooklyn to Philadelphia, the Hudson Valley, the East End of Long Island and beyond. Updated daily!" **http://casacara.wordpress.com**.

Historic Homes of Minnesota by Jennifer Kirby. Tagline: "Historic homes and buildings in Minneapolis, St. Paul, Twin Cities, Stillwater, and Minnesota. Learn the local history of old real estate and the types of architecture seen in Minnesota since the early 1800's." **www.historichomesofminnesota.com**.

at exponential rates, content on the hyper-local level, say, the level of an individual house in a particular community, is spotty. The best technique for determining whether there is anything online related to your house is to cozy up to your favorite search engine and start entering terms. Try the names of past owners and the architect, if known. If your house is commonly referred to by a particular name, look for that.

Do a search by location, but don't just stick to the city. Try the county, state, or region as well. Government websites may have online resources, such as aerial maps or tax statements. The websites of historical organizations may provide basic local history, plus something related directly to your search. A blogger may be tracking the history of houses in your area and have information to share. If nothing useful is apparent within the surface pages of a website, drill down through the various links to see if the juicy stuff is below. If you're sure a website has more information, but you cannot navigate to it, contact the site owner and ask for help.

Should building codes, construction techniques, or decorating trends interest you, enter terms such as uniform building code history, wood framing, milk paint, or whatever you're curious about into a search engine and check the results. Play around with search terms, substituting alternate, but similar words for your original term, which may bring you different or more satisfactory results.

Share What You've Assembled

Once you have finished assembling the history of your house, do not keep it to yourself. Share what you know. You can do this in several ways. Consider making two additional copies of what you've collected, including photographs. Three-ring binders with sheet protectors make for inexpensive storage vehicles. Keep the original documents for your records; leave a copy in the house for future owners; and donate a copy to your local historical organization.

You can also share your house history knowledge online, thus expanding hyper-local content. The applications available for this are virtually endless. You can start a blog to present what you've learned, upload house photos to Flickr or Picasa, or make videos about remodeling projects for YouTube or Vimeo. In addition to these venues, the Minnesota Historical Society designed a website, *Placeography*, for sharing the history of houses and other buildings. *Placeography* is presented in a wiki format, which means that anyone can add to or edit the site, but is not limited to Minnesota. In fact, the tagline says it is "A website about any place anywhere that anyone can edit," so people the world over, including you, can contribute. *Placeography* can be found at www.placeography.org.[3]

Regardless of whether you want to dabble in house history or delve into its intricacies, plenty of resources exist to aid in your endeavor. The history of your house merely awaits your assembly.

Mary Warner is museum manager of the Morrison County Historical Society in Little Falls, MN, and is a member of the AASLH Small Museums Committee. She can be reached at staff@morrisoncountyhistory.org.

Footnotes

[1] National Fire Protection Association, "2008 National Electrical Code® Handbook dedicated to Jack Wells," 5 February 2008, www.nfpa.org/newsReleaseDetails.asp?categoryid=1734&itemId=37760 (3 March 2009).

[2] Ristow, Walter W. and Library of Congress, "Sanborn Fire Insurance Maps," 15 December 2003, www.lib.berkeley.edu/EART/snb-intr.html (3 March 2009); The Sanborn Map Company, Inc., 2002-2007, sanborn.com (3 March 2009).

[3] Minnesota Historical Society, *Placeography*, www.placeography.org (6 March 2009).

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Not Just a Bunch of Facts: Crafting Dynamic Interpretive Manuals

By Donna R. Braden

Too often, written interpretive manuals are merely compilations of facts—if these manuals exist at all. Drawing from best practice in the field of interpretation—along with techniques borrowed from exhibition development, material culture studies, and even Walt Disney Imagineering—this technical leaflet will describe strategies for focusing and organizing a written manual that will help to ensure meaningful and memorable presentations for diverse audiences. At least some of this information may be familiar; however, what is new is the proposed structure for creating a written manual that is content-rich while at the same time being consistent, easily accessible, and enduring.

Much has been written about the subject of interpretation: what it is and why it is important, how to develop an interpretive plan and train interpreters, and how to deliver interpretive messages (see “Additional Resources”). But this literature offers little in the way of strategies for writing it all down—crafting a dynamic interpretive manual that can significantly aid in the successful delivery of any size and scope of interpretive program.

Why is it important to write it all down? How can a written manual contribute to the success of an interpretive program?

Here are several reasons:

- It encourages staff to define a clear focus, which helps in both the planning and the delivery of the program.
- It gets staff at all levels of the institution (from administrators to educators and interpretive planners to docents) on the same page about the key concepts and topics for an interpretive program.
- It has "staying power," living on beyond the original planning of the program, documenting all the good thinking that went into that plan and, ideally, lessons learned during the implementation of the program.
- If organized in a flexible format, it can be updated, added to, and reorganized as the program is refined. These changes can easily be documented and made accessible to interpretive staff.
- It provides a concrete, consistent tool for training and evaluation.

This technical leaflet describes the core components of a dynamic written interpretive manual that provides the framework for delivering an engaging, effective interpretive program. Examples of written manual components are drawn from the interpretive manuals and training guides of several of the historic structures at The Henry Ford in Dearborn, Michigan. In their broad range, time frame, and scope, many of these structures have served over the years as testing grounds for interpretive program planning, development, implementation, and, of course, the creation of written interpretive manuals. The ideas and recommendations included here draw from the evolution of my thinking over the course of almost four decades of experience and experimentation.

Core Components of a Dynamic Written Interpretive Manual

- Museum Mission Statement
- A Hierarchy of Themes, with one Big Idea that leads to three interpretive themes, then clearly connects to all other material
- A Narrative Backstory
- Connections to the Physical Site
- Audience Engagement
- Delivering the Presentation

First, Your Museum's Mission

Every written interpretive manual should begin with your museum's mission statement, the centerpiece for your institution. As Harold Skramstad explains in his essay, "Museum Mission Statements and the Accreditation Process":

> A clear and focused statement of mission stakes a museum's claim to its distinctiveness, is a guide to action, and a powerful yardstick against which the museum itself can assess each and every activity it carries out.[1]

The choice of themes and subjects for interpretation should always build upon, support, reference, and add value to the museum's mission. In the written manual, it is best to overtly state the mission and describe how the interpretive program relates to it.

Next, A Hierarchy of Themes

Interpretation experts commonly utilize thematic interpretation as a communication strategy. Themes are the central messages or key ideas that both guide you to hone in on the main points and help visitors get a focused understanding of what is unique or significant about your site or program. Themes also make the communication easier to follow and more meaningful to visitors, because they connect all the ideas, topics, stories, and physical evidence together. They also steer you away from just giving lists of facts.[2]

But, as many experts will tell you, effective interpretation is not just a collection of themes. Interpretation should be easy for visitors to follow. For this it needs to be organized, and the written manual can model this. As the authors of the book *Great Tours!: Thematic Tours and Guide Training for Historic Sites* argue, the most effective, memorable learning often occurs when big ideas are used as an umbrella for smaller, related ideas. When done creatively, this hierarchy of ideas becomes easy for both interpreters and audiences to follow, because it is both organized and—no matter what is being communicated—it relates back to the same core ideas. By using this organizing structure, an interpretation can bring in many different topics or pieces of information that illustrate and reinforce a limited number of essential concepts. In this way, the constant but varied reinforcement helps visitors remember what is important while avoiding boredom.[3]

The organizing structure should start with one main idea. Not two. Not three. One. Always one. If the experience has a single focus that unifies all its parts, it will likely be easier for interpreters to convey and make more sense to visitors. Everything else should build off of that.

In the literature on interpretation, this hierarchy of themes takes on different names, like theme and sub-themes, or main message and sub-messages. For the

Firestone Farm, Greenfield Village

primary theme or main message, I recommend using a foundational exhibition development term: the Big Idea. Using the term "Big Idea" immediately clarifies that it is separate from, and bigger than, other themes or messages. In her book, *Exhibit Labels: An Interpretive Approach*, Beverly Serrell argues that "a Big Idea is big because it has fundamental meaningfulness that is important to human nature. It is not trivial." It should be a one-sentence statement of what the exhibition or program is about, including a subject, an action, and a consequence.[4]

The Big Idea should be followed by three supporting interpretive themes. Although writings on interpretation might suggest more than this number (varying to as many as seven), we have found that three work best, providing a sort of easy-to-remember symmetry. Embodying the same basic characteristics as the Big Idea, they should each:

- Present one discrete idea;
- Be specific enough to have focus but not be too narrow;
- Give unity and coherence to multiple things;
- Serve as a "basket" for other smaller concepts;
- Be inherent in, illustrated by, or supportive of the material culture and physical evidence at the site.[5]

Examples of the Big Idea/Interpretive Theme Hierarchy

J. R. Jones General Store

The J. R. Jones General Store provided a place where, in the mid-1880s, the rural residents of Waterford, Michigan, became interconnected with the outside world.

1. The business of storekeeping
J. R. Jones, like other storekeepers of the 1880s, possessed only a little bit of capital but a lot of business ingenuity and a willingness to take risks.

2. Availability of goods in the 1880s
An ever-increasing assortment of new consumer products was sold in rural stores like this one, due to factory production, railroad distribution, and new forms of advertising.

3. Customer needs and wants
Making purchasing choices among the array of available goods in this store involved individual customers' backgrounds, economic and social status, and personal values.

From "J. R. Jones General Store Training Workbook," Greenfield Village, The Henry Ford, 2014.

Continuing with this hierarchy of themes, any additional information in the written manual should ideally convey how it relates back to one or more of these interpretive themes (which ultimately relate back to the Big Idea). This might include biographical information, site history, a furnishings list, descriptions of process demonstrations, and published articles, as well as supporting images, documents, or maps. As a result, many bits of previously disparate information and compilations of facts now have a context. They become part of a whole system of linked ideas.

The Narrative Backstory

While the Big Idea and interpretive themes are important, meaningful, and focused, they can seem a bit didactic when interpreters are looking to bring emotion into creating an engaging presentation. Taking the Big Idea, interpretive themes, and additional information about your site and turning them into a story brings people and emotion to the forefront.

It should go without saying that effective interpretation involves good storytelling. In her article, "Storytelling: The Real Work of Museums," Leslie Bedford argues:

> Stories are the most fundamental way we learn. They have a beginning, a middle, and an end. They teach without preaching, encouraging both personal reflection and public discussion. Stories inspire wonder and awe; they allow a listener to imagine another time and place, to find the universal in the particular, and to feel empathy for others.[6]

Writing the main ideas in the form of a story establishes this narrative format from the outset, providing another form of encouragement that gets away from "just a bunch of facts."

But how to write a brief narrative that includes main points, emotional resonance, and a story structure with a beginning, a middle, and an end? In my experience, the best model comes from the process of the Walt Disney Imagineers, who design the attractions at Disney theme parks. Inspired by Walt Disney's unflagging interest in and attention to storytelling, an Imagineering team creates what is called a "story behind the story," or a "backstory," for every new show or attraction.

The backstory is a story-based equivalent of the Big Idea. For Disney Imagineers, it provides the framework for every decision going forward and informs every detail that contributes to the experience. Because it is primarily a design aid utilized during the planning of an experience, the backstory may never actually be shared with Disney park guests. But it is there to support the structure of the story, "just as steel, wood, and concrete support its physical structure."[7]

How might this narrative backstory idea work in a museum context, where we interpret authentic objects, people, and places? Although the backstory for a museum program will, of course, take a more serious, reflective, and real-world turn than a Disney theme park attraction, the narrative structure can still apply. In the written manual, this narrative backstory should follow the Big Idea and interpretive themes—to show both how these are juxtaposed and how they work together.

Dymaxion House: Big Idea/Interpretive Themes Juxtaposed with Narrative Backstory

Big Idea/Interpretive Themes

The Dymaxion House challenges visitors to explore how house design can affect the way people live.

- The innovative materials helped create an efficient and adaptable structure.
- The factory production of components rendered the house affordable.
- The domestic spaces were engineered into a "system for living," maximizing space, facilitating ease of maintenance, and paying little regard to existing cultural expectations of house and home.

Backstory

The year is 1946. Wichita residents make their way to the Beech Aircraft factory because they have heard there are tours of a very different kind of manufactured home there in the factory. They are curious about this house that is touted as "designed to change the way people live." Besides, they are painfully aware that the housing crunch is acute, and money is tight. Why not see what this house offers?

Personnel at Beech Aircraft, producers of the house, are eager to hear what people (especially homemakers) think about the house and they have quickly devised a short marketing tour of the unique house. The marketers make sure to set the scene for the tour by first showing a short film [that] reminds guests of the housing crunch and touts the Dymaxion House as not only being innovative in design but offering a whole new, affordable way of living. The film, they hope, will raise such anticipation that guests will then eagerly move toward the entrance to the house, awaiting a peek at this new-fangled home.

From Dymaxion House Planning Documents, Henry Ford Museum, The Henry Ford, 2000.

Connections to the Physical Site

As Michael P. Gross and Ron Zimmerman maintain, effective interpretation involves connecting tangibles with intangibles. Linking broad, big-picture concepts embedded in the Big Idea and interpretive themes to the surrounding physical space and material culture brings the ideas down to earth and makes them accessible, engaging, and memorable.[8]

A dynamic written interpretive manual should overtly point out the connections between the Big Idea and the interpretive themes and such perceptible evidence as historic structures, architectural elements, landscapes, rooms, and objects people used, as well as supporting photographs, documents, maps, etc. The interpretive planning process should determine which ideas are most strongly evoked in the interpretive spaces and what material culture and/or documentary evidence can best illustrate these themes. Connections between the Big Idea, the interpretive themes, and the material evidence can be captured through a matrix or through object- or theme-based narratives in the written manual.

J. R. Jones General Store: Material Culture Connections

Examples of material culture related to Interpretive Theme #3:

- Making purchasing choices among the array of available goods involved individual customers' backgrounds, economic and social status, and personal values.

A young, single female customer who wants to look fashionable might choose:

- Curling iron
- Hair pins
- Knitted mittens
- Seasonal fabric and matching ribbon
- Pair of gloves
- Box with collars
- Lady's hat and hat pin
- Fan

A couple with growing children might choose:

- Blank book for spelling
- Infant's knit saque
- Dr. Hand's teething lotion
- Queen Anne laundry soap
- Eagle Brand condensed milk

An elderly customer who is old-fashioned might choose:

- Chewing tobacco
- Candlestick
- Old-fashioned style of pants
- Rockingham teapot

From "J. R. Jones General Store Training Workbook," Greenfield Village, The Henry Ford, 2014.

It is also a good idea to include here a description of specific program elements, as they can provide a tangible means to illustrate intangible ideas. These descriptions should also highlight the elements' relationship with the Big Idea and interpretive themes.

Henry Ford Birthplace: Program Elements

Audio Scripts

Description: Short audio snippets in the Formal Parlor, Dining Room, and Kitchen. Taken from the reminiscences of Henry and his sister Margaret, the snippets are told by different family members.

Relationship to Big Idea and Interpretive Themes: These help flesh out and reinforce the interpretive themes in this building: positive influence of the family, dislike of farm chores, and innate mechanical abilities.

Scrapbooks

Description: The Formal Parlor and Kitchen each [has] an interactive flip book in the form of a historical scrapbook. These are written from the point of view of Margaret Ford as a girl, and were inspired by her reminiscences.

Relationship to Big Idea and Interpretive Themes: These help flesh out and reinforce the interpretive themes of positive influence of the family and dislike of farm chores.

From "Henry Ford Birthplace Interpretive Training Handbook," Greenfield Village, The Henry Ford, 2012.

Audience Engagement

Knowing your audience is key to effective interpretation. And, as interpretation experts will tell you, one size does not fit all. Audiences differ in numerous ways, from age and gender to background and previous knowledge to motivations and learning styles. Engaging audiences through interpretation involves having at least a basic handle on the needs and characteristics of different audiences. A written manual can promote this understanding.[9]

The literature on audiences is vast. How can a written manual provide interpreters with at least a basic understanding of different audiences? This section of the manual should include at least four elements: a list of target audiences for the specific program; pre-determined visitor outcomes aimed at these audiences; a brief background on each target audience; and suggestions for tailoring presentations to these audiences.

Target audiences should, ideally, be determined when the program is being planned. These might be broad, or they may be as specific as: families with young children; specific age or generational groups; visitors from a particular segment of the local community; school-age audiences of specific grade levels; special-interest audiences like hobbyists or collectors; corporate groups; or specific types of special-needs audiences.

Visitor outcomes related to these target audiences, usually also developed during the planning of the program, should additionally be included here. What do you want your audience to take away from the experience—in thoughts, feelings, memories, or actions? Visitor outcomes are not simply learning objectives—although these can be considered, especially in relation to school-age audiences. At all times, they should involve strategies for making your interpretation more relevant and meaningful to your audience by:

- Providing context, giving meaning to the ideas;
- Bridging the familiar with the unfamiliar, letting people understand what you're saying by connecting to something they already know;
- Making emotional connections, thereby giving the intellectual information more importance;
- Bringing the ideas down to a personal level, to something people care about and will most likely remember.[10]

J. R. Jones General Store

Target Audience

- Primarily, Greenfield Village daily visitors (local/tourist, families and other social groups).
- Repeat visitors, especially during spring and fall, for special focus presentations.
- School-age audiences and teachers, particularly for grades 4–6 and 8.

Visitor Outcomes

As a result of interaction with objects, people, and place, visitors to the J. R. Jones General Store will:

- Become impressed by the quantity, variety, and far-reaching origins of products;
- Become curious about what the products are and how they fit into people's daily lives;
- Learn respect for the risks and decision-making options of sellers and buyers at this time;
- Feel a kinship with the original customers to the store, realizing that the process of making decisions about purchases is similar in many respects to the ways in which we make decisions today.

From Donna R. Braden and Mary Lynn Heininger, "General Stores: The Process and the Product," ALHFAM (The Association for Living Historical Farms and Agricultural Museums) Proceedings of the 1993 Conference and Annual Meeting, St. Paul, Minnesota, XVI (1994): 48.

It is also helpful to include in the written manual additional background information and presentation guidelines related to the program's target audiences. This should include a list of important characteristics of target audiences, as well as strategies for tailoring presentations to them.

Characteristics of Family Audiences

- Visit in a social unit, attach great importance to social interaction.
- Personalize information, using it as a springboard for family interaction to reinforce their own experiences and family history.
- Want concrete information, not abstract concepts.
- Have diverse expectations and experiences, but consider the needs, comfort, and happiness of all group members to be pivotal to the success of the visit.
- Are most interested in active participation.

From "The Family Audience," Document Prepared for Furniture Exhibit Upgrade, Henry Ford Museum, The Henry Ford, 1997.

Tailoring Presentations to Family Audiences

- Present to the children.
- Include some aspect of family life.
- Use words that make ideas and concepts easily understood.
- Maintain eye contact with parents—they will let you know when they are ready to move on.

From "Basic Presentation Skills Presenter Training Manual," The Henry Ford, 1997.

Delivering the Presentation

According to Gross and Zimmerman, knowledge of interpretive methods is the third component of effective interpretation. It facilitates a connection between the meanings of the resource and the interests of the visitor, and engages diverse audiences through a variety of methods. A dynamic written interpretive manual can reinforce these points, including a description of, expectations for, and strategies relating to the type of delivery to be given for a particular program.[11]

First, this section should reiterate that your mission statement informs every presentation delivered. The mission statement serves as the foundation for the stories you deliver. The manual can include ideas for stories and presentations that connect the interpretive program's main ideas to the organization's mission.

Second, the manual should describe the type of interpretation to be presented. Is the interpretation to be first or third person? What are the advantages of this type of interpretation at your site? What does

The Henry Ford

Dymaxion House interior, Henry Ford Museum

this entail? What are the expectations for this type of delivery? How might an interpreter best prepare for and deliver this type of interpretation?

Firestone Farm Interpretation

At Firestone Farm, our goal is to make visitors feel as if they have just stepped back in time to an 1880s farm—not just any 1880s farm, but the farm on which Harvey Firestone's family lived and worked. However, the presentation staff does not take on the roles of family members. We practice third-person living history on Firestone Farm, not first person. Third-person interpretation is:

- Living history in which the presenter may look, behave, and perform tasks from the past, but maintains his modern personality and has modern knowledge.

Why do we practice third-person living history?

- In third-person presentation, staff can gauge visitor interest, ask questions, and "hook" them by creating connections from the site to their lives today.
- We feel that this is most effective for delivering our mission.

From "Firestone Farm Manual," Greenfield Village, The Henry Ford, 2012.

Beyond that, many books discuss common strategies and techniques for presentation style and visitor interaction, and relevant ones might be included in the manual. These might be organized as a list of techniques and brief description of each, including such delivery techniques as use of voice, language, gesture and facial expression, greeting the audience, honoring questions, and treating visitors with respect.[12]

Firestone Farm: Sample Interpretive Skill Competencies

- Gets visitors' attention through the use of voice and movement and maintains it through the use of story.
- Incorporates language that evokes the five senses, understands voice strengths and weaknesses, and modulates tone, intensity, and pitch when presenting.
- Uses direct questions to initiate or maintain interaction and open-ended questions to open up dialogue.
- Uses gestures, movement, facial expressions, and eye contact to convey image and to direct and maintain visitors' attention.

From "Firestone Farm Manual," Greenfield Village, The Henry Ford, 2012.

Suggestions for creating individual presentations that incorporate the Big Idea, interpretive themes, narrative backstory, and material evidence of the site might be included in this section. Space in the manual for individual interpreters to try writing out their own presentation outline or story that includes a beginning, middle, and end can also be added.

Additionally, it might be a good idea to include in the written manual expectations for interpreters' competencies that will ultimately lead to their performance evaluations. What skills will interpreters be judged on? Here, in the manual, everyone has consistent access to this information.

Everything Else

Other basic informational items for a written manual can include:

- General logistics
- Policies and procedures
- Safety and security protocols
- Emergency information

These should be easy to find, perhaps color-coded, and called out by a tab.

Because revisions to the interpretive program are inevitable, it is best to maintain an electronic version of the written manual for easy updates and printouts.

Conclusion

Putting thought and effort into creating written interpretive manuals will greatly enhance interpreters' ability to make connections to visitors. A well-organized interpretive manual provides a clear plan for communicating essential concepts about the past. Incorporating best practices from relevant disciplines and utilizing examples from the various historic structures that comprise The Henry Ford, this technical leaflet has elaborated a six-part model for crafting effective and engaging interpretive manuals.

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[1] Harold Skramstad, "Museum Mission Statements and the Accreditation Process," in *Museum Mission Statements: Building a Distinct Identity*, ed. Gail Anderson (Washington, DC: American Association of Museums, 1998), 9.

[2] See, for instance, Sam H. Ham, *Interpretation: Making a Difference on Purpose* (Golden, CO: Fulcrum Publishing, 2013); John A. Veverka, *Interpretive Master Planning*, Volume One: Strategies for the New Millennium (Edinburgh: MuseumsEtc, 2011); Barbara Abramoff Levy, "Interpretation Planning: Why and How," in *Interpreting Historic House Museums*, ed. Jessica Foy Donnelly (Walnut Creek, CA: AltaMira Press, 2002); and William J. Lewis, *Interpreting for Park Visitors* (Fort Washington, PA: Eastern National Park and Monument Association, 1981).

[3] Barbara Abramoff Levy, Sandra Mackenzie Lloyd, and Susan Porter Schreiber, *Great Tours!: Thematic Tours and Guide Training for Historic Sites* (Walnut Creek CA: AltaMira Press, 2001), 4; and Levy, "Interpretation Planning," 48.

[4] For a more in-depth explanation, see Chapter 1, "Behind It All: A Big Idea," in Beverly Serrell, *Exhibit Labels: An Interpretive Approach* (Walnut Creek, CA: AltaMira Press, 1996), 1-8; quotation, 1.

[5] Levy, "Interpretation Planning," 53.

[6] Leslie Bedford, "Storytelling: The Real Work of Museums," *Curator: The Museum Journal* 44, no. 1 (January 2001): 33.

[7] The Imagineers, *Walt Disney Imagineering: A Behind the Dreams Look at Making the Magic Real* (New York: Hyperion, 1996), 42.

[8] Michael P. Gross and Ron Zimmerman, "Park and Museum Interpretation: Helping Visitors Find Meaning," *Curator: The Museum Journal* 45, no. 4 (October 2002): 274. For one of the key foundational works focusing on the interpretation of material culture, see E. McClung Fleming, "Artifact Study: A Proposed Model," *Winterthur Portfolio* 9 (1974): 153-73.

[9] Useful sources that specifically describe different audiences and their characteristics include: John H. Falk and Lynn D. Dierking, *Lessons Without Limit: How Free-Choice Learning is Transforming Education* (Walnut Creek, CA: AltaMira Press, 2002); Alison L. Grinder and E. Sue McCoy, *The Good Guide: A Sourcebook for Interpreters, Docents, and Tour Guides* (Scottsdale, AZ: Ironwood Press, 1985); and Douglas M. Knudsen, Ted T. Cable, and Larry Beck, *Interpretation of Cultural and Natural Resources*, 2nd ed. (State College, PA: Venture Publishing, 2003).

[10] Lisa Brochu and Tim Merriman, *Personal Interpretation: Connecting Your Audience with Heritage Resources*, 2nd ed. (Fort Collins, CO: National Association for Interpretation, 2008), 37-38.

[11] Gross and Zimmerman, "Park and Museum Interpretation," 274.

[12] Useful sources that describe specific presentation strategies and delivery techniques include: Grinder and McCoy, *The Good Guide;* Levy, et al., *Great Tours!;* Sam H. Ham, *Environmental Interpretation: A Practical Guide for People with Big Ideas and Small Budgets* (Golden, CO: Fulcrum Publishing, 1993); *The Docent Handbook* (Berkeley, CA: National Docent Symposium Council, 2001); and Margaret Piatt, "Engaging Visitors Through Effective Communication," in *Interpreting Historic House Museums*, ed. Jessica Foy Donnelly (Walnut Creek, CA: AltaMira Press, 2002).

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