

A Golden Age for Historic Properties

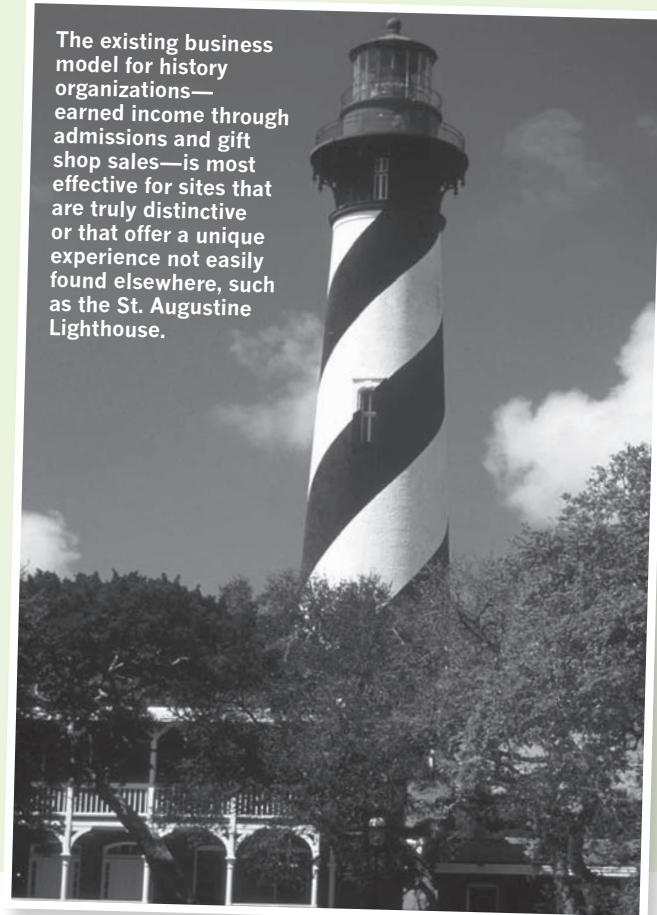
The following article was written to spur fresh thinking at a gathering of leaders in the fields of preservation, philanthropy, and historic site management, held this past April at Kykuit, a property of the National Trust for Historic Preservation. The three-day meeting on the Sustainability of Historic Sites in the 21st Century was sponsored jointly by the Trust, AASLH, the American Association of Museums, and the American Architectural Foundation with the generous support of the Rockefeller Brother's Fund.

The purpose of the gathering at Kykuit was to initiate serious examination and discussion within the historic site community about a number of long held professional standards, practices, and assumptions, and how they might be related to declining attendance patterns at most of these sites.

In the article that follows, John Durel and Anita Nowery Durel propose a new business model for historic properties based on national trends: the expectations of boomers as they enter the next phase in their lives; the emergence of social networking and Web 2.0; the search for meaningful experiences in modern life; and the growing fundraising success of churches, universities, and hospitals. Taken together, the authors report that these trends suggest a new way to think about the long term value of museums, historic properties, and similar organizations.

—James M. Vaughan, Vice President, Stewardship of Historic Sites, National Trust for Historic Preservation

The existing business model for history organizations—earned income through admissions and gift shop sales—is most effective for sites that are truly distinctive or that offer a unique experience not easily found elsewhere, such as the St. Augustine Lighthouse.



St. Johns County Visitors and Convention Bureau

BY JOHN DUREL AND ANITA NOWERY DUREL

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

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

- Stop thinking of “visitors” and start thinking of “members.”
- Stop thinking of “them” and start thinking of “us.”

- Stop thinking of “interpretation” and start thinking of “facilitation.”
- Stop focusing only on the intellectual and social content of the experience, and start including spiritual content.

CULTURAL TOURISM: AN OUTDATED BUSINESS MODEL

In its simplest form, a business model is a way to describe how an enterprise builds its capacity in response to a perceived need or desire on the part of some portion of the public. The model is successful if enough people pay enough money for the enterprise’s products or services to enable it to produce those products and services in a financially sustainable way.

Over the past three decades, the dominant business model for historic properties has been cultural tourism, in which the organization provided a history experience for a visiting public in exchange for admission fees and museum shop sales. The model became dominant at a time when nonprofits were expected to be run like businesses with customers paying for services received. The diagram on page eight

EXTERNAL FACTORS

- Large boomer population of families with children
- Popularity of history, spurred by the Bicentennial
- Leisure time used for family vacations
- Motor coach tours for senior citizens
- In schools, a desire for educational enrichment through field trips

INTERNAL CAPACITY

Historic sites offered:

- Living history
- A “new” social history—stories of ordinary people
- Historical interpretation
- Interdisciplinary research: archaeology, oral history
 - Museum education: hands-on activities for children

REVENUE

- Admission fees
- Program fees
- Gift shop sales

depicts this model.

This model worked reasonably well for some organizations. To a degree, it continues to be effective for a handful of sites that are unique or offer an experience that cannot be easily found elsewhere such as the St. Augustine Lighthouse because many tourists want to climb to the top. However, most historic sites have always depended upon other sources of revenue to balance the books—special fundraising events, foundation grants, government support, and endowments. Most have created a patchwork of operating revenue sources resulting in staff who often spend time on revenue-generating activities only marginally connected to the mission.

Colonial Williamsburg has been the granddaddy of the cultural tourism model. Remember those 1-800-HISTORY commercials with the happy families walking along Duke of Gloucester Street? These days, Williamsburg hosts fewer families than two decades ago. Recently the *New York Times* reported that visitation to Colonial Williamsburg “dropped to 710,000 last year from 1.1 million in 1985, despite two decades of investing millions of dollars to try to make the museum relevant to a younger, more diverse group of tourists.” This decline in tourism is widespread, with many other historic sites and national parks reporting comparable figures.¹

What has changed? American families are still taking vacations, but the competition is stiff. Cultural sites must compete with Disney World, Las Vegas, Europe, and other vacation destinations. Additionally, the lack of transportation funding for school fieldtrips has become a widespread and chronic issue. And senior citizens now appear to be taking their bus trips mainly to casinos.

Whatever the reasons, the old model is no longer viable. Efforts to make it work with new programs or better marketing will fail. The growth experienced in the 1970s and 1980s has tapered off and begun to decline. Unless something changes dramatically, the decline will continue and we will see more properties being sold or shut down.

The question to ask is, what is the new business model to replace cultural tourism? To move to a new growth curve requires taking risks. We have entered a period of uncertainty as we try to figure out what will work next. It is a time to try

new approaches, learn from mistakes, recover quickly, and build on successes. With smart people, strategic thinking, and discipline, an organization should be able to make the transition successfully.²

To make the leap, we must challenge long-held assumptions about historic sites and start to see them in new ways. We must also look beyond our own industry to others in both the nonprofit and for-profit sectors. The following sections offer thoughts on possible dimensions of a new model.³

BOOMERS WITH TIME AND MONEY

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

Another retired friend has just purchased a five-acre farm in the country. She keeps small livestock and grows organic vegetables. She has started a membership program, much like a co-op, where people who live in nearby towns and suburban communities pay a fee for the opportunity to help on the farm and receive a portion of the produce. She organizes special days where members gather to work, cook, and eat together.

The husband of one of our cousins, a retired manager from Shell Oil Company, has had a life-long interest in World War II, stemming from stories he heard from his father. Now his time is his own. He spends his days at the library, researching particular army units or military engagements, and presents what he learns to a

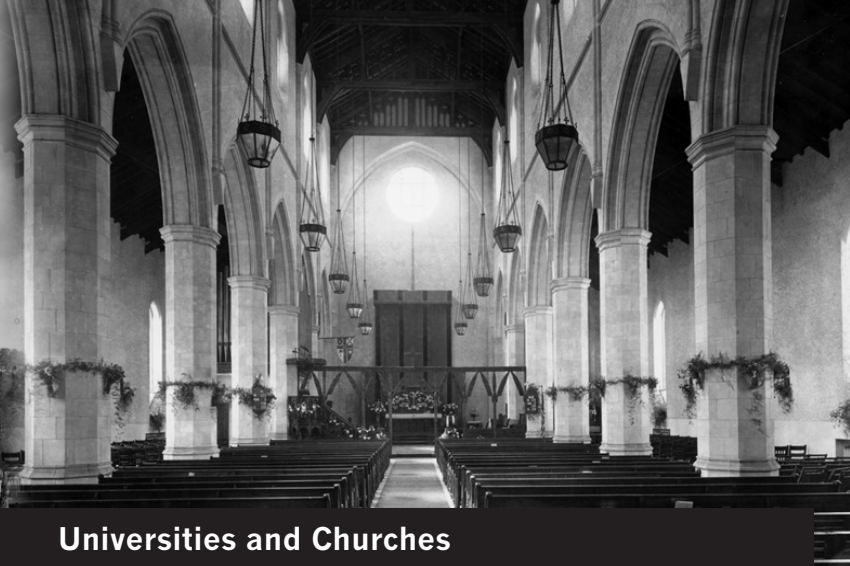
Retiring baby boomers will have time and money to spend, providing a great opportunity for history organizations. One boomer retiree with a life-long interest in World War II, spends his days researching at the library and presents what he learns to a roundtable. He is a member of several museums with World War II collections. He is active in preserving World War II oral histories. To him, it is both his passion and responsibility.



Left: istock Simon Askham; Right: istock Pamela Moore

roundtable of others who share his interests. He travels and is a member of several museums that have World War II collections. Through oral histories, he is preserving the stories of veterans in his community. He sees this as both his passion and his responsibility.

We know of others who are looking forward to retirement, or at least partial retirement. They will pursue interests that they have had for many years: birding, cooking, hiking, travel, sailing, writing, music, collecting, gardening, quilting, repairing motors, antiques, genealogy, history, you name it. Since many leaders of historic properties are boomers themselves, we are sure they have their own ideas of what they will



Universities and Churches

do in retirement. (One of John's pursuits will be astronomy. Anita will be gardening. We'll be birding together.)

As boomers enter retirement, with time and money to spend, historic properties have a remarkable opportunity. A site can become both the venue and the organization through which like-minded individuals pursue their common interests. Many retirement activities will involve nature and being outdoors. Many historic properties have land, gardens, and trails to serve these purposes. Many retirees will want to deepen their knowledge or perfect a skill. Many sites have collections, libraries, work spaces, equipment and expertise to enable them to do so.

SMALL AFFINITY GROUPS

One of the striking aspects of stories about retirement is that many activities are done in groups. The need to associate with others who share an interest is basic to human nature. When people no longer have a workplace to go to everyday, they seek camaraderie elsewhere. For years, many McDonald's restaurants have tapped into this need with breakfast clubs, where seniors meet each morning to have coffee and kibbitz. For some, the social affiliation becomes a significant part of their lives, as is indicated by these obituaries:

From the *Charlestown Daily Mail*, in West Virginia:
 "He was a member of the Judson Baptist Church and McDonald's Breakfast Club and was an Army veteran of World War II."

From the *Augusta Chronicle*, in Georgia: "She was a homemaker and had retired from Seminole Mill.... Honorary pallbearers will be members of the McDonald's Breakfast Club of Clearwater."⁴

As boomers enter retirement, there is likely to be a surge in small affinity groups. Most won't be going to McDonald's. They will join existing groups or form new ones centered on their interests. They will not wait for someone else to organize their activities. Groups will plan their own programs, trips, events, and gatherings. Historical organizations can potentially provide venues, resources, and overarching structures for these groups. Small affinity groups could become the pri-

An advantage of a model organized around members and affinity groups is that people develop a sense of belonging and ownership. The largest amount of giving, thirty-six percent, goes to churches and religious institutions, whose affiliation is one of the more meaningful relationships in a person's life. Educational institutions receive the second largest percentage, thirteen percent, and have typically divided alumni into classes, recognizing that a graduate's attachment is to his or her fellow classmates.

mary audience for historic properties in a new business model.

In *The Tipping Point*, Malcolm Gladwell observes that people tend to belong to several groups. Most have a sympathy group, ten to fifteen people for whom they care deeply. Larger groups vary in size and intensity. One hundred and fifty appears to be the maximum group size within which individuals can have genuine relationships where everyone knows everyone else well enough to feel connected.⁵

An historical organization could structure its membership program so that it has several special interest groups within the general membership. Each affinity group would be relatively small to allow for the development of strong relationships. There could be a gardener's guild, a history study group, a collector's club, and so forth. Groups need not be limited to the obvious topics. There could also be a cooking group, a music group, an astronomy group, a travel group, a hiking group—whatever any group of individuals might want that makes legitimate use of the organization's resources. Each affinity group would plan and implement its own programs and activities for its own members as well as others. Through dues, the group would support the whole organization.

Historic properties already have experience with retirees who serve as volunteers helping to weed gardens, give tours, or care for collections. They are seen as extra help for the staff, whose primary concern is to serve the public. In the future, the retirees may be both staff and the primary audience.

THE LOOMING STAFF CRISIS

The sheer number of retiring boomers causes another issue, as the *New York Times* recently reported in an article on the growing number of vacancies in city manager positions around the country. Government officials see a shrinking pool of qualified candidates to fill these jobs. The *Times* article states, "with the bulging post war generation nearing its retirement years, statisticians forecast a growing gap of unfilled executive and managerial jobs."⁶

This talent shortage will impact every industry, including

museums and historic properties. Over the next ten years it will be increasingly difficult to replace retiring executive directors, curators, and senior managers. Eventually, the way we staff historic properties will change.

Signs of this coming change have been evident for several years. In many fields of endeavor there are “free agents” who work under contract with companies rather than as employees. They run the gamut from computer technicians to nurses. Nearly twenty-five percent of Americans now work with a degree of flexibility in choosing when and where to work.

In museums we have seen the rise of the independent professional, fueled by boomers who no longer want to work inside an organization, and by a younger generation that enjoys autonomy. In the future we are likely to see more outsourcing of museum functions (e.g. an independent curator who works for several museums) and increasing use of the Hollywood model of bringing talented individuals together for a specific project, rather than having them on the staff all the time. As these structural changes occur, the size of the staff at history museums and historic sites will shrink. Remaining staff will become coordinators rather than doers, managing the work of others and ensuring that talent and expertise are in place when and where needed.⁷

At an historic site in the future paid staff may function as resource coordinators, helping affinity groups do the work. Someone will work with the history study group and the exhibits group to produce exhibits. Someone will work with the gardeners and the nature club to care for the grounds. Someone will work with the drama society and musicians to create performances for the community. The staff will supply expertise and resources; the group members will do much of the work.

eBay offers a possible model for this kind of organization. The Internet-based marketplace does not actually buy and sell anything. Rather, it provides a structure and system so that anyone can buy and sell. In this sense, an historical organization would not have to plan or implement activities for its members. It simply would provide a structure and system so that members could do things for themselves.

There are other organizational structures that have no centralized control. Wikipedia, where anyone can post articles on any topic, is self-policing. The participants take their role very seriously and strive to make articles objective, accurate, and easy to understand. Craigslist has no central control; the people who use it post the entries and police themselves by flagging inappropriate or incorrect information. These are called open systems because they allow anyone to interact with anyone else, without a third party telling

them what they can or cannot do.⁸

Systems that distribute both the work and the authority to make decisions function effectively only if everyone shares certain values and if there are mechanisms for self-policing. This could be a model for historic properties if all affinity groups and individuals share a strong preservation ethic and if there are ways to resolve differences of opinion.

LESSONS FROM PHILANTHROPY

A distinct disadvantage of the cultural tourism model has been that it seeks to attract a large number of visitors who likely will visit the site only once. Limited to this experience, these visitors are unlikely to form a strong attachment to

the organization. Members, on the other hand, have multiple experiences—visits to the site, receipt of newsletters, attendance at special events, etc. The more active the member, the stronger the attachment and the greater likelihood he or she will renew and become a donor. In the long run, an investment in membership will have a far greater payoff than a comparable investment in cultural tourism.

Again, the private sector offers a model. Some

successful businesses, called small giants, have resisted the temptation to grow excessively large. They have the option to open branches or expand into other communities, and thereby have more customers. However, they choose to remain small, foregoing growth in favor of intimacy. They are committed to their local communities and their local customers. They prefer loyal customers whom they see often, rather than many more customers whom they see infrequently. As historic sites have pursued growth, it is often at the expense of this intimacy. We have gone after large numbers of visitors, whom we see only once, rather than focusing on a smaller number of members whom we see regularly.⁹

A distinct advantage of a business model organized around members and affinity groups is that people who are active in an organization over a period of time develop a sense of belonging and ownership. When they participate in small group activities they become friends with other participants and then their commitment is not only to the organization but also to their friends. In time they are eager to give their support when asked because they know that the organization's success will benefit people they care about.

This is the heart of fundraising. People give to people. They give to organizations that mean something to them and where they have close relationships. The vast majority of giving in the U.S.—more than eighty-three percent each year—comes from individuals. Corporations and foundations contribute less than seventeen percent of the total.¹⁰

Of total giving, the largest percentage (thirty-six percent



At historic sites in the future, staff may serve more as coordinators assisting affinity groups. Staff supplies expertise and resources and group members complete the work. The Internet offers a model of this at work, as sites such as eBay and Wikipedia provide a structure and a system for its members to do the work, buying and selling (eBay) and drafting, editing, and posting articles (Wikipedia).

eBay Corporation and Wikimedia Foundation



in 2003) goes to churches and religious institutions. This is not surprising since affiliation with one's church is probably the most meaningful relationship someone has to an organization. The attachment is not just to the institution, but also to the people. Megachurches have emerged over the past three decades, even as many traditional churches have experienced decline in membership. These new churches can accommodate thousands of worshippers at Sunday services. However, during the week, activity takes place in much smaller groups. There are numerous programs, clubs, and ministries that are organized and maintained by the members themselves, with the support of staff. These groups are not limited to religious activities. Some focus on exercise, losing weight, getting out of debt, and investing. These churches are characterized by high levels of commitment, participation, and financial giving.

Educational institutions receive the second largest percentage of giving (thirteen percent). Universities have long divided the total alumni into classes, recognizing that a graduate's attachment is to fellow classmates more than to the undifferentiated institution. Alumni are also organized geographically to encourage graduates to socialize with one another in their home communities. Other groupings include members of a sports team or a student club. Through reunions and social events, the university seeks to sustain individual personal connections, thereby sustaining support for the institution.

Hospitals also receive significant philanthropic support. In major research hospitals, fundraising is organized around a particular disease or doctor. Grateful patients are moved to fund research and care for those afflicted with the same disease they have suffered. Major gift officers work with doctors and patients to nurture relationships and build support.

Another growing trend in philanthropy is the formation of giving circles, made up of individuals who share a particular interest, such as women's issues, the environment, or arts and culture. Giving circles permit people of ordinary means to have a greater charitable impact by combining money and making grants collectively. For example, twenty members in a circle might each contribute \$500. Then they would solicit and review proposals, conduct site visits, and make decisions on where to give. A single grant of \$10,000 could make a genuine difference in an organization, and that, in turn, would get the members excited and committed to the next round. In communities around the country giving circles have grown and now include hundreds of average-income citizens as donors.

In the old business model, historic sites have no group equivalent to alumni, grateful patients, or giving circles. Development has been largely a matter of writing grant proposals and organizing fundraising events. Little attention has been given to cultivating major individual donors, except during capital campaigns.

At the most successful fundraising institutions—churches, schools and hospitals—the cultivation of donors, individually and in small groups, is the primary development activity. Development is the art of making friends and forging valued relationships. Major gifts are thoughtful gifts. They happen when a relationship is deep, trustful, and treasured by

Drayton Hall



Drayton Hall

Sometimes, in special moments, historic places can touch one's soul. In 2005, Drayton Hall received an unexpected donation with a letter explaining that the donor had attended an evening event on the property and fondly recalled seeing the moon shining on the Ashley River.

both parties. From a bond of caring and commitment, major financial gifts are born. And like all relationships, if there is no personal investment to keep the donors in your circle of friends, other causes will appear and their priorities may shift.

The lesson for historic properties is clear. Several hundred loyal members who are active in small groups in your organization are far more likely to make financial contributions than the thousands of visitors you might otherwise try to attract. If you want to build a strong financial base for the future, membership is the best way to go. The job of the executive director and the development director is to cultivate these individuals and turn them into donors, just as major gift officers do at hospitals and universities.¹¹

THE SPIRITUAL DIMENSION OF HISTORIC PROPERTIES

In 2005, Drayton Hall received an unexpected donation, with a letter explaining that the donor had attended an evening event on the property and fondly recalled seeing the moon shining on the Ashley River. Sometimes, in special moments, historic places can touch one's soul.

Immediately following the attacks of 9/11, many historic properties experienced a brief surge in attendance. As the country shut down and people tried to make sense of what was happening, many found a sense of peace and well-being in places of beauty and history. These visits were a respite from the uncertainty and harsh reality of unfolding events. They provided time to reflect on things of deep meaning—the good in humanity, despite the evil; the good in our country, despite its enemies; and the good in our families, despite the danger. These experiences were spiritual, not intellectual. The quest was not to learn about the place, but simply to be there.

Not everyone turned to historic sites at that time, and admittedly the time was unusual. In the course of our daily

lives, most of us do not experience historic sites as places of spiritual or emotional import. However, the 9/11 phenomenon gives us a clue to the role sites can play in the future. Often in extreme situations people reveal something true about themselves. Historical organizations have unique qualities that tap into this truth, even in ordinary times.

Historic sites are physical places with strong spiritual qualities. When the authors ask people about their best museum experiences, they often describe a time alone, or with a small group, when they were able to really be in the place, to sense its beauty and history, and to feel the presence of the past. One museum director told us of being the last person in the Sistine Chapel, and with the permission of the guard, lying on the floor looking upward. Who would not be moved by such an experience?

Americans have begun to take spirituality seriously. Moving beyond the materialism that has dominated American life for the past half century, more and more people are looking for meaning and purpose in their lives. This quest for meaning offers an opportunity for historical organizations. The spiritual qualities of historic sites can serve as sources of insight and inspiration for people who seek an experience that transcends the mundane.¹²

TOUCHSTONE BETWEEN HERITAGE AND LEGACY

For many boomers, entering this next stage in life will be like a mini-9/11 wake-up call. It will be a time to reflect on what is most important, now that the obligations of career and raising a family are past. With only twenty or so productive years remaining, what will one do with the rest of one's life?

It will be a time for many to look both to the past and the future. Some people will have heightened interests in their roots and finally take that trip to the places where ancestors once lived. Many will look ahead and wonder what legacy they will leave. They will think of their children and grandchildren and the world they will inhabit. They will reflect on their values, the beliefs and principles that are most important to them, and hope that their descendants will inherit them.

Historic properties are the touchstone between the past and the future, between heritage and legacy. This is evident in many typical mission statements: "We preserve the past for the benefit of future generations." We work hard to keep the past from disappearing, to keep it tangible and present, so that those who come later can touch it and connect to it. The connection is physical. It is only through this material link that other connections, both intellectual and spiritual, can be made.

Our time on this planet is short, part of a continuum of human lives stretching back nearly 200,000 years, and forward for who knows how long. What will be our mark? What will be our legacy? Such questions occur late in life. The tangible nature of historic sites offers a unique opportunity to leave a mark. Through intimate attachment to a physical site one can make a real connection between one's heritage and one's legacy. By caring for the site, what one has inherited is passed on to others.

Historic properties have a special role to play over the next twenty years. Not only can they give retiring boomers

a place to pursue interests and friendships, they can make it possible for someone to make a lasting difference. Becoming involved and attached to a site can make one's last decades of life especially rewarding, fulfilling a basic human need to honor one's ancestors and to leave something of enduring value for those who follow.

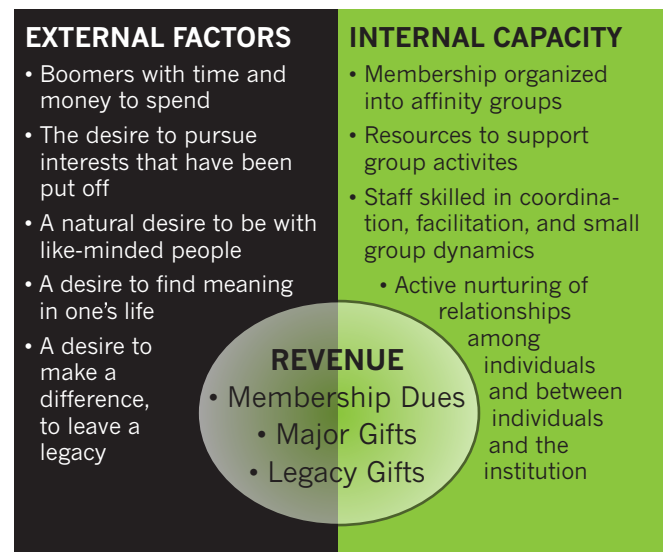
Individual bequests accounted for nine percent of all money donated in 2003. Opportunities to receive a bequest will increase as the boomer generation ages. In fundraising parlance, a bequest is a person's ultimate gift. This is the way individuals can make a final contribution to the well-being of those they love and the success of institutions they value. If toward the end of life an individual is closely attached to your historic site, and has made good friends there, and if you have an active planned giving program, then there is a strong probability that your institution will be remembered in his or her will.

Benefactors look to support organizations that share their values. They wish to use their wealth to underscore what is meaningful to them. Through planned giving, they desire to make a lasting difference. For historic properties, this is the great opportunity of the years ahead.

A NEW BUSINESS MODEL: AFFINITY GROUPS

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

This new model will require a fundamental redesign of our organizations:



FACILITATORS, NOT INTERPRETERS

Recently, a colleague who works in a history museum told us this story. Years ago, she and her father visited the old Arts and Industries Building at the Smithsonian. The displays of industrial equipment and machinery were not her favorite exhibits, but her father, a retired machinist, was enthralled. In front of a

OLD MODEL	NEW MODEL
Organize activities for others.	Provide intellectual and logistical support so that they can organize activities for themselves and others.
Be the expert. Teach them what you know.	Practice peer learning: they learn from you, you learn from them. You are knowledgeable enough so that you can help them continue to learn on their own.
Control what others do. Set limits on what they are allowed to do.	Trust them. Set professional standards and educate them. Then trust that they care enough to do no harm.
Decide what they will do. Direct their activities.	Facilitate their discussions and decisions.
Create membership and volunteer programs so that they support the organization.	Create a membership program so that the organization supports the members, who in turn become committed and support the site through their work, their dues, and their donations.
Consider yourself the leader in charge of the activity.	Consider yourself a peer leading quietly through support and facilitation.
Consider the site as your site and they are visitors.	Consider the site as their site as well as yours, that together you take responsibility for it.
Think and act in terms of “we” and “they.”	Think and act in terms of “us.” You are peers pursuing common interests.

display of pumps he began to talk about his life as a mechanic on a ship. Soon visitors nearby began to listen to his story. After a while one of them began to cry. It turned out that her parents had immigrated to this country on that very ship.

Who is the interpreter of history in this incident? What is the meaning of the objects on display? Who determines what is relevant?

For years, the people who run historic properties have seen themselves as interpreters of the past. They have done research, selected artifacts, arranged rooms, and given tours in order to inform the lay public about the history of a particular place, family, or time. Some have given brilliant tours that are highly engaging and informative. More often, the tours have been simply adequate, providing visitors with a satisfying but unremarkable experience.

In the future this approach will not work. People who affiliate with a site will already be knowledgeable. Their desire will be to deepen what they know. They will be impatient with guides who have only a cursory knowledge of the topic. They will want to discover new information, explore different interpretations, and share their own knowledge and opinions. A gathering of such a group in an historic house will not be one in which an interpreter tells about the place. Rather, it will be a group discussion, facilitated by someone who can draw out different perspectives, encourage new questions, and generate fresh understanding.

This new role will require a different set of skills. Instead of historical interpreters, we will need historical facilitators. Facilitation requires the ability to ask questions that lead to new insights. It calls for someone who can draw others into a dialogue in which everyone’s knowledge is valued. The facilitator must understand the different interpretations of a topic, engage people in consideration of multiple perspec-

tives, and then lead them to resources that may expand and deepen their understanding. The facilitator must be a lifelong learner whose own enthusiasm for new information and insight inspires others to learn more.

CHILDREN AND FAMILIES

The inertia of moderately successful education programs for families and children may prevent some organizations from fully embracing the new business model. Educators will worry about abandoning this traditional, albeit dwindling, audience. They are likely to see the issue in terms of mission. Even though this audience has abandoned the historic site, and not the other way around, some employees will feel that the mission compels the organization to serve children and families.

While many historic sites have experienced a decline in admissions, attendance at children’s museums has increased steadily over the past two decades. The leaders of historic sites have, of course, been aware of this and have adopted some of the interactive and participatory techniques used by children’s museums in an effort to attract more families. Still, their numbers are declining.

One historical organization that has bucked the trend, the Strong National Museum of Play in Rochester, New York, has done so by fully embracing the children’s museum model. Since the mid 1990s, the Strong has functioned as a children’s museum on the first floor and a somewhat traditional history museum on the second. Recently, the leaders there have begun to reconcile the dichotomy by interpreting the history of play. No other historical organization has followed the Strong into the world of children’s museums. And none has had anything close to its growth in attendance, from 130,000 visitors in 1991 to a projected 525,000 in 2007.

One of the key elements of the children's museum model is that children and accompanying adults are not seen as visitors so much as users. Children come to play and learn, and many come back again and again. In effect, they are members who use the museum as a resource for developing and expanding skills and knowledge. Few people would say the same about an historic site.

It is time to face the reality that children today have many opportunities to learn and that historic sites are low on the list. Television, the Internet, video games, and organized after school and weekend activities take up most of their leisure time. In school they focus on testing, with few opportunities for field trips.

The new model for historic properties does not preclude children and families; people of all ages may join affinity groups. The determinant will be interest, not stage in life. One can easily envision a collector's group where young and old sit together to compare what they have and share what they know. Indeed, this offers a great opportunity for mentoring and learning across generations.

It will be important to project a strong welcome to all people, offering everyone an opportunity to pursue an interest. Membership must be open to all, and all must feel welcome, regardless of wealth, social standing, or any other characteristic. There is a tendency for groups to become insular, and in setting up the overarching membership structure and structure of individual groups, historic sites must take this into account.

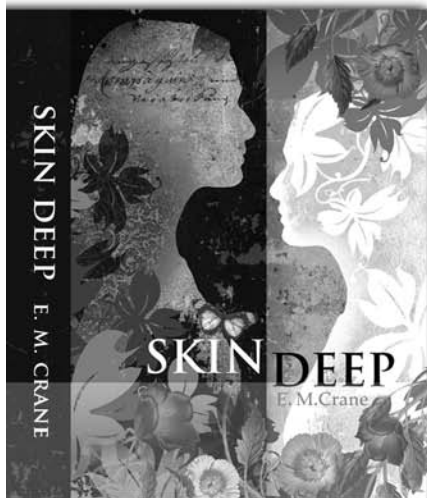
THE ROLE OF THE BOARD

Under the new model, the governing board will retain its fiduciary responsibilities. It will ensure that the organization's resources are effectively and ethically managed and used to further the mission. However, the composition of the board is likely to change, reflecting the new constituency of affinity groups. Boards will recruit new members from the groups, since that is where they will find individuals who are most interested in and committed to the success of the organization.

The board will have to approve policies that govern the new organizational structure. While the staff's role will be to support the affinity groups with resources, expertise, and facilitation, the board will have a role in establishing policies that define the relationships among and between the groups and the organization as a whole.

The board's role in fundraising may become easier under the new model, since the identification of potential donors can mesh with the membership program. Currently, board members are asked to use their networks to identify people who could be approached to support the organization. Often these individuals have no connection to the organization other than through the board member. The new affinity groups will offer fresh avenues to identify prospective supporters. Among the hundreds of group members, some are likely to have the financial means to make significant gifts. If board members are members of affinity groups, they can easily play an active role in identifying and cultivating donors. They

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can also encourage their other acquaintances to join a group, thereby broadening the base of potential support.

MIND, BODY, AND SPIRIT

Historical organizations will have to support a rich array of activities for their affinity groups. Beyond the intellectual pursuits, affinity group members will organize social events featuring food and fun. A physical dimension will also be vital, including labor, exercise, and play. Travel will probably be important as well. An institution would do well to have resources and a network so that groups can visit their counterparts at other historic sites. A network of affinity groups at historic sites could potentially evolve, making it easy for individual members to connect with others with similar interests as they travel the country.

The greatest value will come from a site's spiritual dimension. Members should have special times when they can be alone or in small groups to appreciate the meaning and spirit of the place. It is this quality of historic properties that sets them apart from other organizations that may also attract affinity groups. While one might join a group anywhere, participation in one at an historic site will have special appeal for people who value beauty, nature, heritage, a connection to place, and a deeper meaning in life.

A CALL TO ACTION

Now is the time for leaders of historic properties to challenge their staffs and boards. They must abandon the assumptions of the old model and begin to test the waters of the new. Success will not come overnight. But if they do not initiate changes, it may be too late to reverse the decline. Specifically, leaders should:

- Replace the number of visitors with the number of members as the key indicator of success in achieving the mission. Start treating membership as a strategic rather than administrative function. Hire the right kind of membership director, someone who understands the process of building relationships.¹³
- Start exploring, experimenting, and testing ways to support and share authority with affinity groups. For example, the Brooklyn Historical Society has opened one of its galleries to community groups to produce their own exhibits. This is a first step in inclusion, building relationships, and learning how to support rather than direct others.
- Select an existing group of volunteers, such as those who tend the gardens, and discuss with them the possibility of a new structure and relationship, whereby they become an affinity group as a part of the membership program. Examine the pros and cons and run a pilot program to learn what works. Recognize that this will require a change in roles and behavior, but that in the long run it promises great benefit to all concerned.
- Start a major gift/planned giving program to cultivate your members and turn them into donors. Educate all board and staff regarding their roles in identifying individuals, being advocates, and nurturing relationships. Initiate a donor-centered, integrated development process.
- Produce more opportunities for people to experience the spiritual dimension of your site. Offer times when they can be



The Strong National Museum of Play

The Strong National Museum of Play in Rochester, NY, has bucked the trend of declining museum attendance. After embracing the children's museum model, the Strong has seen attendance grow from 130,000 in 1991 to a projected 525,000 in 2007.

alone or in small groups, with time to reflect, sense the beauty, and feel the presence of the past. Invite participants to share their feelings and to become a part of your organization.

A GOLDEN AGE

In our work with museums and historic properties, which largely consists of strategic planning, development planning, interpretive planning, and organizational coaching, we, the authors, often find ourselves addressing both chronic and acute financial challenges. Many institutions have gone through years of red ink, eviscerated their reserves, and downsized staff. Even institutions with large endowments have faced layoffs and cash restrictions. More often than not, immediate financial concerns prevent the thoughtful implementation of plans for the future.

Such financial crises can get you down. It's hard to be optimistic about the future. Yet, we are optimistic because we understand that the problem is structural and reflects neither the inherent value of historic sites nor the competency of those who lead them. We believe that historic properties will thrive over the next twenty years if they respond to changing external realities.

Now is the time to begin the shift. The historic properties that do so successfully will create a revered place in their communities and contribute more than ever to the happiness and well-being of their fellow citizens. ●

¹ "Homes Sell, and History Goes Private," *New York Times*, 31 December 2006.

² Will Phillips, *The "S" Curve: Causality and Viscosity – Concepts for Understanding Your Organization*, www.qm2.org; Internet.

³ Many of our thoughts about a new business model parallel those of John H. Falk and Beverly K. Sheppard in *Thriving in the Knowledge Age: New Business Models for Museums and Other Cultural Institutions* (Lanham, MD: AltaMira Press, 2006).

⁴ Quoted in "Retirees Take It Slow Amid the Fast Food," *Baltimore Sun*, 7 February 2007.

⁵ Malcolm Gladwell, *The Tipping Point* (Boston: Little, Brown, and Company, 2000, 2002), Chapter 5.

⁶ Ralph Blumenthal, "Unfilled City Manager Positions Hint at Future Government Gap," *New York Times*, 11 January 2007.

⁷ For more on these trends, see John Durel, "Museum Work Is Changing" in *History News*, Summer 2002.

⁸ Ori Brafman and Rod A. Beckstrom describe open organizations in *The Starfish and the Spider* (New York: Portfolio, 2006).

⁹ Bo Burlingham, *Small Giants: Companies That Choose to Be Great Instead of Big* (New York, Portfolio, 2005).

¹⁰ Giving USA Foundation – AAFRC Trust for Philanthropy/*Giving USA 2004*.

¹¹ We are not suggesting that individual giving will totally replace support from government, foundations, and corporations. Indeed, family and private foundations have grown significantly in the past few years. Many wealthy individuals are choosing this means to support the causes that interest them. As with individual donors, foundations and corporations have to be cultivated. The new business

model can be helpful by making it easy for an organization to demonstrate active community participation. The key point is that a true major gifts cultivation program is crucial to future financial success.

¹² Daniel H. Pink, *A Whole New Mind: Moving from the Information Age to the Conceptual Age* (New York: Riverhead Books, 2005), 207–222. Pink identifies the search for meaning as a key characteristic of American culture in the next half century.

¹³ The membership program in a health club is a strategic function at the top of management's agenda. Selling memberships and serving and renewing members are activities that drive the finances. The health club industry has studied membership extensively. If you want to increase revenue from membership, you can learn a lot from health clubs. Qm² has a management briefing, "Growing Revenue from Membership Programs," which is available from the authors.

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