

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.

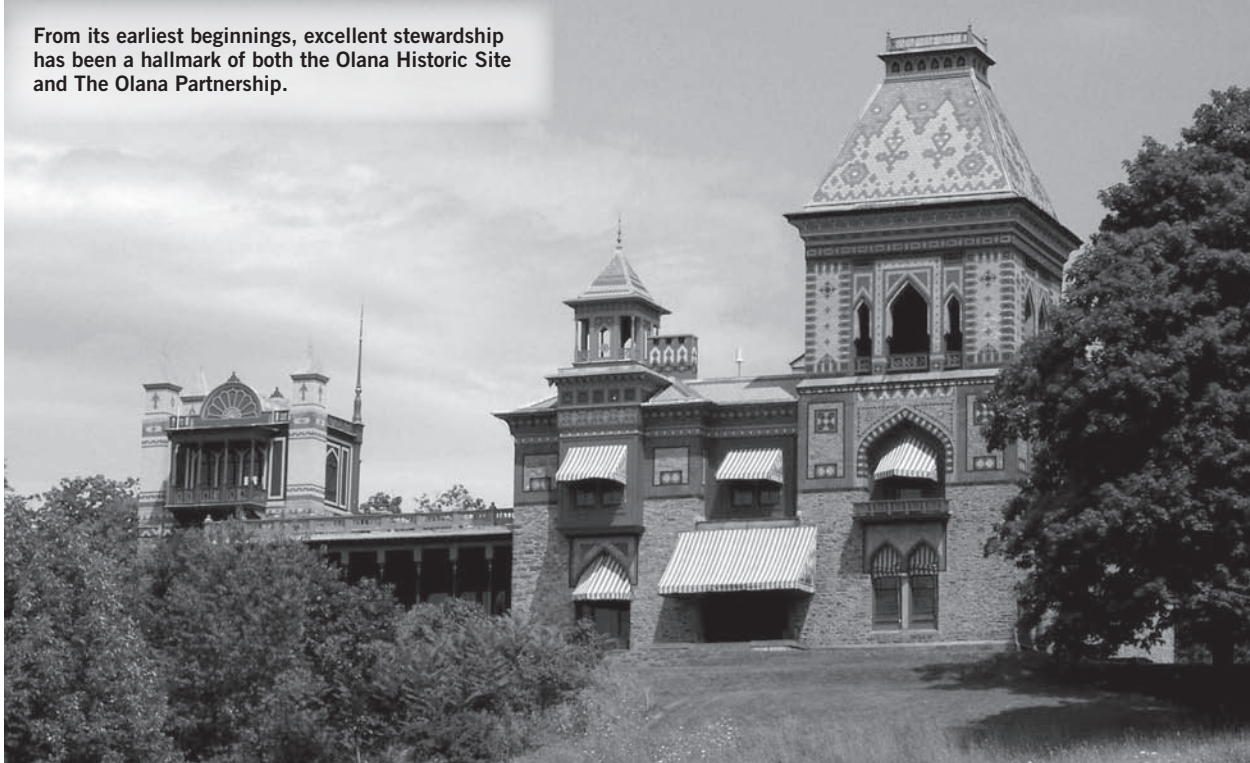
- Do historic house leaders:
 - Know the site's neighbors?
 - Identify audience needs and interests?
 - Regularly identify new audiences in planning programs and events?
- Do community groups and local institutions invite historic house leaders to participate in their programs and plans?

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-

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.

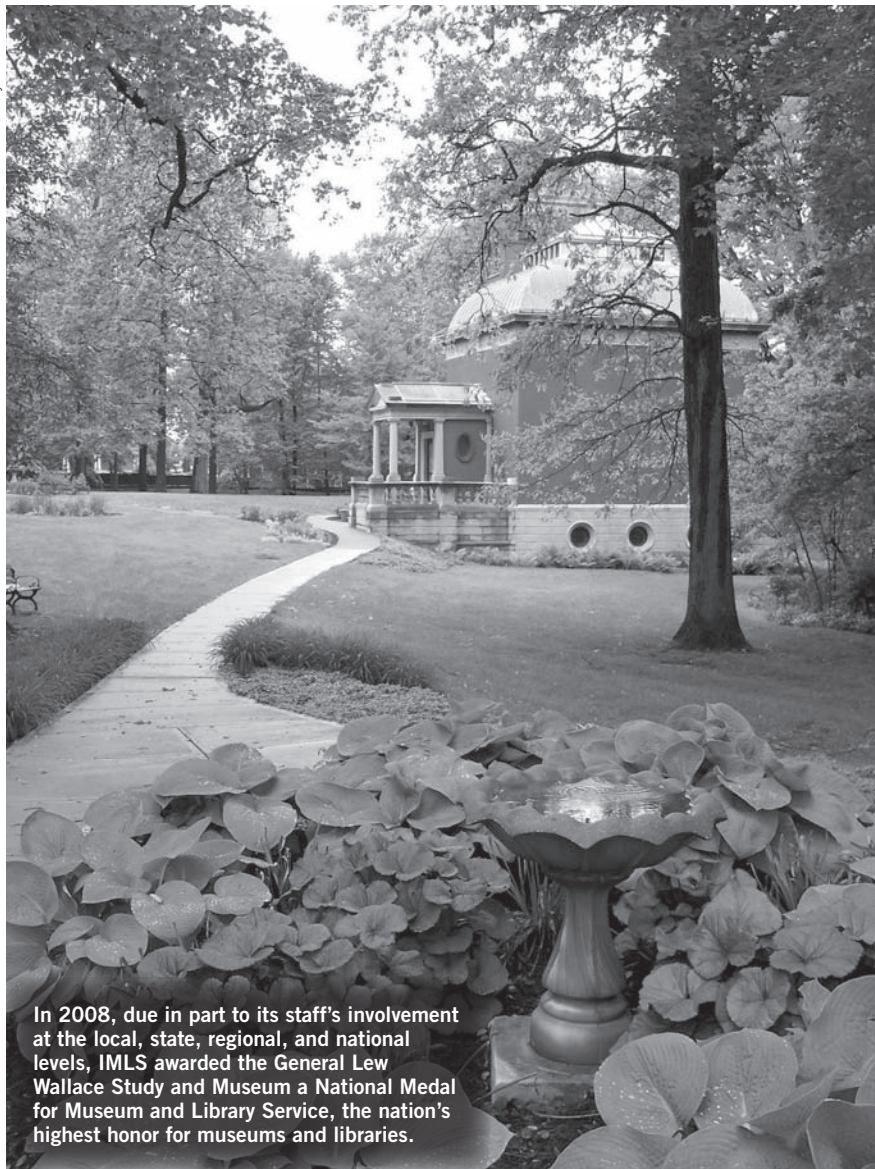
In addition to being involved on a local, state, and regional level with professional history organizations, the General Lew Wallace Study and Museum has been recognized nationally for its outstanding public programs. In 2008, IMLS awarded the museum a National Medal for Museum and Library Service, the 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*



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

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.

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?

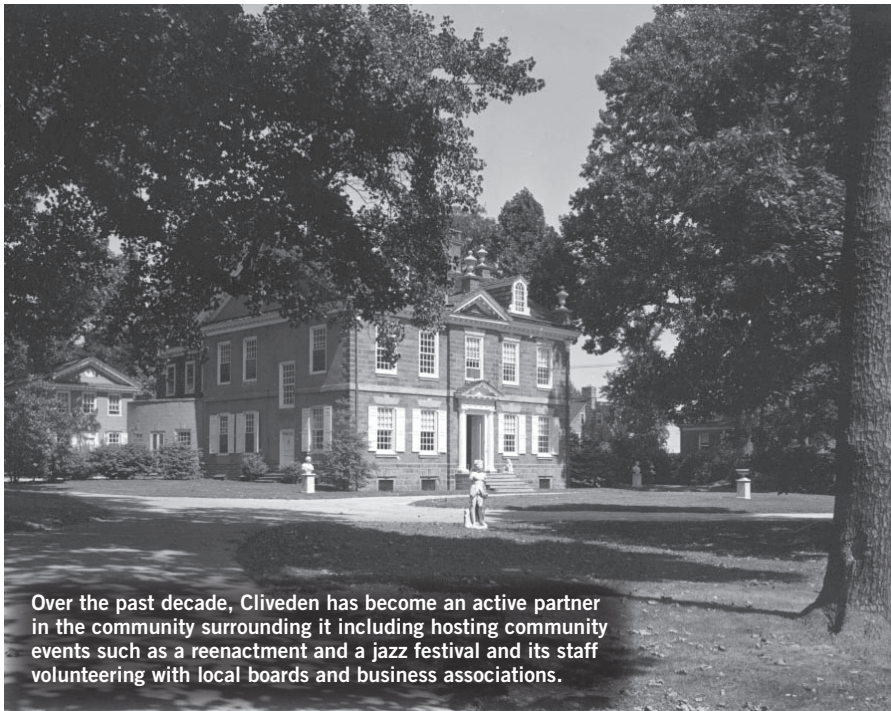
In Practice: James K. Polk Home—Columbia, Tennessee (www.jamesk-polk.com)

Mission: *The mission of the James K. Polk Memorial Association is to operate, maintain, preserve, and re-*

store 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

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.

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

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.



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 land-*

scape, 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.

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:

Barbara Silberman, Heritage Partners Consulting, Gloucester, MA, Chair⁵

T. Patrick Brennan, Georgia Trust, Atlanta, GA

Liora Cobin, Evanston Historical Society, Evanston, IL

Terry Dickinson, Preservation Society of Newport County, Newport, RI

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

Wendy Franklin, California State Parks, Sacramento, CA

Sara Harger, Kentucky Historical Society, Frankfort, KY

Bethany Hawkins, AASLH, Nashville, TN

Benjamin Hruska, University of Arizona, Phoenix, AZ

Julie Parke, Decorative Arts Center of Ohio, Lancaster, OH

Beth Richards, Consultant, Concord, NH

AASLH Sustainability Kit for Historic Houses Advisory Committee:

Alice Smith Duncan, Hyde Hall, Cooperstown, NY

Mark Heppner, Stan Hewyet Hall and Gardens, Akron, OH

George Laughead, Ford County Historical Society, Dodge City, KS

Patricia Murphy, Oberlin Heritage Center, Oberlin, OH

Laurie Rayner, Connecticut Humanities Council, Middletown, CT

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.