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# Historic House Museum Sustainability in the 21st Century: Paths to Preservation

Susan R. Orr  
*Seton Hall University*

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HISTORIC HOUSE MUSEUM SUSTAINABILITY IN THE 21<sup>ST</sup> CENTURY:  
PATHS TO PRESERVATION

Thesis submitted to  
The Graduate College of Seton Hall University  
In fulfillment of the requirements for the degree of  
Masters of Arts in Museum Professions with an emphasis  
In Museum Registration

Susan R. Orr

Thesis advisor  
Juergen Heinrichs

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## ABSTRACT

When a historic house is converted into a historic house museum, its function changes from one of domesticity to one that corresponds with the ideas and values held by those that pursue instituting a museum. The establishment of historic house museums was a testament to the role of American popular history and the early models affected the way these museums would grow in the future. Today, Americans still cherish the concept of house museums with an estimate of over 15,000 historic house museums in the United States.<sup>1</sup> The fervor began to decline in the 1990s due to changing attitudes in historic interpretation, changing demographics across the United States, as well as social, technological, and economical changes. As the 21<sup>st</sup> century began, people associated with historic preservation and museums began to ask if there were too many historic house museums to be viable. This paper aims to sort through the reasons that have led to the emergence of over 15,000 historic house museums, explore the sustainability of historic house museums, and suggest solutions that can be utilized to make certain that the largest number of house museums can be sustained in a meaningful way.

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<sup>1</sup> The Pew Charitable Trust. "What to Do With These Old Houses." Trust Magazine Spring 2008: available online @ [http://www.pewtrusts.org/trust\\_magazine\\_drill.aspx?id=38622](http://www.pewtrusts.org/trust_magazine_drill.aspx?id=38622).

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## **Table of Contents**

Abstract

Acknowledgements

Chapter I – The Home as Museum

Introduction

Classification of Historic House Museums and Historic Organizations

Examples of House Museums in Crisis

Chapter II: The Beginning of Historic House Museums

History

Movements in Museum Preservation

Organizations Involved in Historic House Museums

Chapter III: Problems

Inexperienced Board Members

Funding

Demographics

Interpretation

Maintenance

Chapter IV: Solutions

Merger and Asset Transfer

Reuse

Sale or Donation with Protective Easements

Resident Curatorship

Community

Chapter V: Conclusion

Appendix A

## **Table of Contents**

Appendix B

Bibliography

## CHAPTER I – The Home as Museum

### Introduction

The home has traditionally been viewed as an important symbol of independence and as a hallmark of social status in the United States. Owning a home is considered a rite of passage for many Americans. Building traditions were brought to American shores by settlers and were based on ethnic and cultural preferences of the parent nation, though adapted to the new environment with locally available materials. There have been many architectural traditions in America since the 1600s and this subject has extensive scholarship, however it is outside the scope of this paper. Instead, this paper explores how these homes, these symbols of independence, have evolved into the largest type of museum in the United States and how to preserve them, legally and ethically, for sustainability.

Laurence Vail Coleman, previous director of The American Association of Museums (AAM), wrote, “Some buildings are distinguished from the moment they are finished...some buildings achieve importance by withstanding the assaults of time...other buildings have greatness thrust upon them by acts of man that create hallowed associations.”<sup>2</sup> When Laurence Coleman wrote Historic House Museums in 1933, the concept of house museums in the United States had been part of American national identity for over eighty years; however there were no formal rules or regulations on the best practices that should be used when dealing with these institutions. Historic House Museums marked the first attempt of the American Association of Museums (AAM) to provide guidance to house museums, which numbered over 400 at the time of Mr. Coleman’s writing. The AAM attempted to address issues such as ownership, administration, finances, preservation, collection, and interpretation in language that could easily be followed by the layperson. The AAM was concerned with the issues of running a historic

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<sup>2</sup> Coleman, Laurence Vail. Historic House Museums. Baltimore, Md.: Waverly, 1933.

house museum but in 1933 did not account for the future of historic house museums, though Coleman hinted at the idea that this type of museum would proliferate in the future in his closing arguments. He concluded with the exciting prospect that the motor car would allow millions of Americans to visit these cherished sites. Two decades later this prospect was rapidly coming to fruition as post war Americans began to take to the roads in automobiles to explore the United States.

In the mid-1940s and early 1950s America saw rapid urban development and expansion, population growth, and massive consumerism. These factors led to government intervention in the form of legislation passed to protect historic sites, wildlife lands, and archaeological sites that were at risk of being destroyed from this rapid development. New attitudes about preservation, along with new thoughts about the role and responsibilities of museums helped the number of historic house museums grow. A study by the nonprofit service organization the Pew Charitable Trust estimates historic house museums in the United States to number 15,000. Present-day Americans still cherish the concept of historic houses, even though in recent years the fervor has begun a steady decline. Reasons for this diminishing interest is due to changing attitudes to historic interpretation, changing demographics across the United States, as well as social, technological, and economical changes. The onset of the 21<sup>st</sup> century made it clear that the large, ever-increasing number of historic house museums may not be sustainable.

In 2002, James Vaughan, the vice president for stewardship of historic sites at the National Trust for Historic Preservation, summed up the problems facing historic house museums. He named competition, quality of preservation and maintenance, as well as interpretation, not keeping up with technology, and current views of education. Authors in museum, historical, and preservation magazines asked whether America even needed any more



historic house museum. Organizations such as the American Association of State and Local History (AASLH), the National Trust for Historic Preservation (NTHP), and the AAM are attempting to create programs that will assist house museums. The task is difficult since information on the exact number, assets, revenues, and governance of these types of museums are difficult to obtain and is scattered across various organizations and locked in proprietary databases.

### **Classification of House Museums and Historical Organizations**

To begin, we must define historic house museum. The National Taxonomy of Exempt Entities (NTEE) is a classification system for nonprofit organizations recognized as tax exempt under Internal Revenue Code 501(c)(3). The system, developed by the National Center for Charitable Statistics (NCCS) is used by the government, as well as the independent sector, as a method to classify and find information on nonprofit organizations. This system of letters and numbers make it simple to narrow down the broad field of nonprofit organizations active in the United States. Museums and historical organizations fall under the *Arts, Culture and Humanities* sector designated by the letter *A*. Museums are defined by the NCCS as “organizations that acquire, preserve, research, exhibit and provide for the educational use of works of art, objects or artifacts that are related to the study of zoology, biology, botany, mineralogy, geology and other natural sciences; history; archeology; or science and technology.” The NTEE then subdivides Museums (A50) into the various types with the closest we get to a demarcation of historic house museum being *History Museum*. The definition of museum offered by the American Association of Museums is broad coming back to the basics that all museums, regardless of type, have in common, a “unique contribution to the public by collecting, preserving, and interpreting the things of this world.” The simplest definition of historic house museum is that it is a house that is

turned into a museum, with or without original furnishings, interpreted to the public. Historical organizations, preservation and societies, which have been the main forces behind historic house museums are also classified under *Arts, Culture and Humanities* but separate from museums. The research for this paper utilizes the codes of the NTEE.

This paper explores solutions that can be employed to sustain historic house museums already in existence as well as offer guidelines to board members and concerned citizens before and during the decision-making process on the best use of a historic house. It is structured with a brief introduction that highlights the issues affecting historic house museums through case studies of museums in crisis. The study departs from an explanation of the foundations of historic house museums and preservation in the United States. Next it provides an overview of the most recent literature and endeavors by professional organizations on the subject of sustainability of historic house museums. Solutions offered will explore how the historic house museum can be repurposed to support the mission while educating the board so that its responsibilities to the public are fulfilled, and ownership options are explored. It will readdress the issues that the AAM tried to address in 1933: ownership, administration, finances, preservation, collection, and interpretation in the modern era. It will do this by being a synthesis of class lectures, books and scholarly publications on museum discourse, professional organizations related to museum work, and case studies.

## **Examples of House Museums in Crisis**

*The path to hell is often filled with good intentions or desires - St. Bernard*

The Mount, built by American Pulitzer prize winning author Edith Wharton in 1902, is a historic house museum with attached gardens located in Lenox, Massachusetts. Mrs. Wharton moved out in 1910 and the house and grounds went through a succession of private owners until it was purchased by the nonprofit organization Edith Wharton Restoration in 1980. It was then leased to a local theater troupe, Shakespeare & Company, until 2001 when renovations began. The estate is on the register of National Historic Landmarks and is open daily May to October and weekends in November and December. The Mount receives an estimated 30,000 visitors annually. In 2005, board members borrowed \$2.6 million to buy Wharton's 2,600 volume personal library from a British book dealer. A fund-raising campaign to cover the loan failed and by summer of 2006 five of the six board members had resigned. After this incident the board was reformed to include people with business expertise and fund-raising experience, however the new board members faced significant financial hurdles and constantly borrowed from a local bank to pay operation costs. In March of 2008, with the housing bubble burst, and the financial crisis looming on the horizon, the Mount had \$6.4 million in outstanding debts and faced foreclosure. Stephanie Copeland, the President of Edith Wharton Restoration, was asked to step down during this time and declined the resignation request. She later consented to the request rather than assume a different position in a restructured management hierarchy.<sup>3</sup> Comparisons of the IRS Form 990s on file with the IRS from 2006-2008 reveals the financial problems occurring

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<sup>3</sup> Pratt, Mark. "President of Financially Struggling Edith Wharton Estate Steps down." *Associated Press* 31 Mar. 2008.

inside the organization.<sup>4</sup> In 2005 the organization was operating with a deficit of \$948,000, the next year it had jumped to a \$1.2 million deficit, and in 2007 the Edith Wharton Restoration, as previously stated, was running a \$6.4 million deficit. To keep the doors open, the board had to raise an immediate \$3 million, which led to the launch of a frantic fundraising campaign.

The Jessie Porter Heritage House Museum located in Key West, Florida will permanently close its doors to the public April 17, 2009, after the conclusion of the 16<sup>th</sup> annual Robert Frost International Poetry Contest. The house is the place where U.S. Poet Laureate Robert Frost vacationed during the winter and was a gathering place for other writers such as Ernest Hemingway, Tennessee Williams, and Thornton Wilder. It was also the home of Jessie Porter, an early champion of historic homes restoration and preservation. Ms. Porter bought homes in Key West that were scheduled for demolition and restored them; encouraging her friends to do the same. Jessie Porter Heritage House was established as a museum in 1995 and was held in the family as a nonprofit. Reasons cited for its closure were declining visitation, increasing operational costs, and other undisclosed financial pressures. The phenomenon known as saturation is the main factor behind the predicament the Jessie Porter Heritage House Museum has found itself in. A large number of museums in a small geographic area create a phenomenon known as saturation. When saturation occurs, the resident population, seasonal visitors, and revenue sources simply cannot support the large number of institutions.

As of 2009 there were six historic house museums, and at least four private and public museums operating in an area 6.4 kilometers (4 miles) long and 2.4 kilometers (1.5 miles) wide with a perennial population of 22,364 and annual visitors slightly over 2 million. The Edith

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<sup>4</sup> GuideStar USA, Inc. "GuideStar Charity Check". GuideStar USA, Inc. 04/07/2010 <<http://www2.guidestar.org/>>.

Wharton Estate and Jessie Porter Heritage House Museum illustrate how precarious it is to take on the preservation, daily operation, visitor attendance, and collection care of historic houses. Compounding the problem of sustainability is the reality that most organizations are run by volunteers who have little or no knowledge of operating a nonprofit institution, limited financial means, and incompetent board members to steer them in the right direction. Historic houses located in remote regions face problems attracting visitors. Institutions in underdeveloped communities may face problems when interest in the historic interpretation is not a main concern or does not exist. Other challenges present themselves when the house is already too deteriorated to begin preservation without causing the nonprofit to accumulate massive, unmanageable debts. The financial crisis that began in 2007 and continues today has added more hardships to these small institutions.

Preservationists, scholars, museum professionals, museum volunteers, governments, and emerging museum professionals need to begin addressing the problem of sustainability. Efforts have been taken to bring the problem of historic house museums to the forefront of people's consciousness with organizations such as the American Association for State and Local History and the American Association of Museums actively developing services and programs to assist in best practices, financial management, and education of those who are responsible for historic house museums. Heritage consulting firms are conducting seminars and meetings across the country, publishing resources and studies in an attempt to prevent the continued proliferation of historic house museums. The Federal government has legislation and programs to help preserve historic sites. Local communities are also beginning revitalization movements where historic buildings are turned into housing and multi-purpose facilities. The activities of these organizations have helped strengthen the questions one must ask oneself before committing to

preserving a historic house museums, however they have not been successful in coming up with answers that will satisfy every house museum conundrum.

## CHAPTER II – History of House Museums

The concept of preserving history is an ancient idea and is not a distinctly western invention. Shrines and temples predate the western concept of a museum, and social scientists believe that at some point in their existence almost all cultures collected, stored, and displayed objects that held specific meaning to their society. The Greeks, who influenced the beginnings of Renaissance thinking about collecting and exhibiting objects, were well documented collectors. Historical consciousness in the United States began to grow shortly after independence from Britain. This consciousness was built upon existing British and European antiquarian models of heritage preservation, modified to fit into the philosophies of the newly created United States. The first institution in the Republic to concern itself with the collection and storage of historical documents was founded in Boston, Massachusetts, on January 24, 1791 by Reverend Jeremy Belknap. The Boston Historical Society served as a repository of historical documents collected from all parts of the new nation and abroad relating to Anglo-American life. This society also included a “cabinet” to collect natural history specimens and unique artifacts for display. The idea of a historical society eventually spread into every state of the Union by the 1850s. It is important to note that during this time the emphasis was on historical documents and not on preserving actual historical buildings. These historic documents were useful for “conduces to mark the genius, delineate the manners, and trace the progress of society in the United States, and must always have a useful tendency to rescue the true history of this country from the ravages of time, and the effects of ignorance and neglect.”<sup>5</sup> The move to preserve historic buildings as shrines to great men of the nation began in the 1830s. A committee, headed by American writer and historian Washington Irving, advocated making Hasbrouck House, the

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<sup>5</sup> Jones, H.G. Historical Consciousness in the Early Republic. No City Listed. North Caroliniana Society, Inc. 1995.

longest serving headquarters of George Washington during the Revolutionary War, a shrine to the general. This action was the beginning of the historic house museum movement. On July 4, 1850 after obtaining a charter from the New York legislature and lobbying the state to purchase the property, Hasbrouck House was dedicated. Hasbrouck House, located in Newburgh, New York has the distinction of being the first publically operated historic site in the country, the first site purchased by the government for the specific purpose of preservation, and is still in operation as a New York State historic site owned by New York's Office of Parks, Recreation, and Historic Preservation and operated by the Palisades Interstate Park Commission.

The enshrinement of Mount Vernon, George Washington's plantation home, set the precedence for the next movement of historic house preservation. A precedent that would continue well into the 20th century; women's societies preserving and interpreting historic houses of colonial forefathers. Once the government purchased Hasbrouck House and established it as a historic site, there was an increase in requests for the government to buy up homes associated with the colonial fathers. However, the nation experienced changes and transformations during the time that New York legislature purchased Hasbrouck House and it was not long before the local and federal governments realized that that funding would not be available to purchase every historic house that the nation felt should be preserved. The government bowed out of the historic house movement in the mid-1850s and the task of historic house preservation became the sphere of women. Traditionally the role of women was regulated to the home and as caretakers of children. Preserving historic houses seemed a natural fit for educated, wealth women during this time period. The first of these societies was the Mount Vernon Ladies' Association of the Union, which set the course for the future historic house model.



Ann Pamela Cunningham founded the Mount Vernon Ladies' Association of the Union around 1853 after her mother expressed concern over the deterioration of the plantation home of George Washington in Mount Vernon, Virginia. Ann Cunningham was able to bring together women from both the north and the south to raise enough funds to purchase the plantation, outbuildings, and 200 acres in 1858. The association took possession of the house in February 1860. This model of a women's benevolence society preserving the home of a great historical figure would continue until the mid-1900s and set the framework within which historic house museums would be viewed into the present day. Organizations such as the Daughters of the American Revolution (DAR), and the Colonial Dames, both founded in the 1890s, followed in the path of the Mount Vernon Ladies' Association. These patriotic societies held as a mission to "teach patriotism by erecting monuments and protecting historical spots, by observing historical anniversaries, by promoting the cause of education, especially the study of history, the enlightenment of the foreign population, and all that makes for good citizenship."<sup>6</sup> Female patriotic organizations were successful in acquiring real estate with endowments and forming corporations to hold the property. They also excelled at professionalizing the historic house museum by creating exhibits and interpreting the house and its occupants to reach the greatest audiences. Women's societies created the fundamentals of historic house museum operation and once these fundamentals were established the historic house movement saw a shift in gender roles as more men became interested in preserving these institutions.

World War I and its aftermath had demonstrated how well house museums could induce allegiant behavior as the postwar era ushered in a hyper-nationalism in the United States. A new found emphasis on "colonial" America began during this time, and the government became more

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<sup>6</sup> West, Patricia. *Domesticating History: the Political Origins of America's House Museums*. Washington, D.C.: Smithsonian Institution Press, 1999.

engaged with historic site preservation. Men, mostly wealthy industrialists, aimed to get more involved in the preservation and professionalism associated with historic house museums, which marked a significant change in the ways in which preservation of historic sites occurred. Wealthy industrialist like Henry Ford, and John D. Rockefeller Jr. created museums based on their idea of American life. Henry Ford constructed a museum in Dearborn, Michigan, by collecting buildings and objects that depicted his idea of American life and physically transporting them to Greenfield Village. John D. Rockefeller Jr. began the restoration of Colonial Williamsburg in Virginia based on his idea of what colonial American life had been. Women were still at the forefront of attempting to protect historic sites, Thomas Jefferson's Monticello being one example. However the benevolence model founded by the Mount Vernon Ladies' Association was not successful in acquiring the estate. An alliance of male lawyers and businessmen in New York, enlisting support from women's groups, successfully made Monticello available to the public in 1923.

Government began to creep into historic house preservation as Franklin D. Roosevelt gave power to the government to claim privately owned historic sites for public use in 1935 with the passage of the Historic Sites Act. This act was the first to explicitly state that it was the government's duty to preserve historic sites. The 1935 Historic Sites Act provided for the preservation of historical and archeological data (including relics and specimens) which might otherwise be irreparably lost or destroyed as the result of (1) flooding, the building of access roads, the erection of workmen's communities, the relocation of railroads and highways, and other alterations of the terrain caused by the construction of a dam by any agency of the United States, or by any private person or corporation holding a license issued by any such agency or (2) any

alteration of the terrain caused as a result of any Federal construction project or federally licensed activity or program.<sup>7</sup>

Roosevelt also enacted New Deal legislation which provided employment and relief to citizens during the Great Depression by creating projects that employed many people and benefited the nation by fixing, building and documenting historically significant sites. Under the New Deal, agencies such as the Works Progress Administration, and the Civilian Conservation Corps worked to conserve and preserve various aspects of American heritage. These two legislations had a dramatic impact on the historic house movement and allowed for future acts to preserve American historic treasures.

The 1940s and 1950s were boom times for America and historic sites. World War II once again showed that historic sites could renew citizen's faith in the country's traditions and America's destiny by creating a patriotic fervor. After the war, the American boom of prosperity and building led preservationists to create new strategies to block the destruction of historic sites as America began to expand. Planned communities, known as suburbs quickly sprang up outside major American cities. These suburbs altered the landscape around cities and shifted the focus from inner city life to a suburban context. Construction, and improvement and expansion of roads and transit systems became necessary to sustain the areas outside cities and these activities put historic sites as well as archaeological sites in jeopardy of destruction. This growth of prosperity and potential destruction of American heritage helped foster the modern preservation movement. The high cost of war had depleted the federal budget and left the government unable to respond to the threat that aforementioned expansion issued to sites with historical significance.

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<sup>7</sup>“Archaeology and Historic Preservation Act”. National Park Service. April 2010 <[http://www.nps.gov/history/local-law/FHPL\\_ArchHistPres.pdf](http://www.nps.gov/history/local-law/FHPL_ArchHistPres.pdf)>.

Even the Historic Sites Act could do little to change this development. Private nonprofit organizations, which had the ability to quickly mobilize when a threat occurred, and possessed the means to work in conjuncture with established federal and state preservation agencies continued the preservation movement.

October 26, 1949, marked the founding of the National Trust for Historic Preservation. It was created to facilitate public participation in the preservation of sites, buildings, and objects of national significance or interest. The National Trust for Historic Preservation is a charitable, educational, and nonprofit corporation. The purpose of the National Trust is to receive donations of sites, buildings, and objects significant in American history and culture; to preserve and administer them for public benefit; to accept, hold, and administer gifts of money, securities, or other property of whatsoever character for the purpose of carrying out preservation programs. It is of interest to note that the National Trust was underwritten by the nation's wealthiest families and conceived by museum professionals, and though affiliated with the government it was not created by the federal government. Corporate sponsors of historic house museums also gained ground in the 1940s. Building on the models put in place by Rockefeller and Ford, many museum "villages" came into existence with Mystic Seaport in Mystic, Connecticut, Plimoth Plantation in Plymouth, Massachusetts, and Old Sturbridge Village located in Sturbridge, Massachusetts, being among the more prominent.

Government legislation to preserve cultural heritage was dominant during the 1960s and 1970s. Many current laws regarding historic sites evolved out of the need to preserve American history as technology, social change, and progress quickly changed the landscape. The building of highways and dams, as well as the expansion of suburbs increased during this time. In 1960 the Archaeology and Historic Preservation Act was passed. The most important act of legislation

to come from the government during this time is the National Historic Preservation Act of 1966. In this Act Congress declared that (1) the spirit and direction of the Nation are founded upon and reflected in its historic heritage; (2) the historical and cultural foundations of the Nation should be preserved as a living part of our community life and development in order to give a sense of orientation to the American people; (3) historic properties significant to the Nation's heritage are being lost or substantially altered, often inadvertently, with increasing frequency; (4) the preservation of this irreplaceable heritage is in the public interest so that its vital legacy of cultural, educational, aesthetic, inspirational, economic, and energy benefits will be maintained and enriched for future generations of Americans; (5) in the face of ever-increasing extensions of urban centers, highways, and residential, commercial, and industrial developments, the present governmental and nongovernmental historic preservation programs and activities are inadequate to provide future generations a genuine opportunity to appreciate and enjoy the rich heritage of the United States; (6) the increased knowledge of historic resources, the establishment of better means of identifying and administering them, and the encouragement of their preservation will improve the planning and execution of federal and federally assisted projects and will assist economic growth and development; and (7) although the major burdens of historic preservation have been borne and major efforts initiated by private agencies and individuals, and both should continue to play a vital role, it is nevertheless necessary and appropriate for the Federal Government to accelerate its historic preservation programs and activities, to give maximum encouragement to agencies and individuals undertaking preservation by private means, and to assist state and local governments and the National Trust for Historic Preservation in the United States to expand and

accelerate their historic preservation programs and activities.<sup>8</sup> It also explained with whom the government would cooperate so as to insure that sites were protected. These entities include state and local governments, Indian tribes, private organizations and individuals. The Secretary of the Interior was authorized to expand and maintain a National Register of Historic Places composed of districts, sites, buildings, structures, and objects significant in American history, architecture, archaeology, engineering, and culture. The National Register began to incorporate entire blocks and areas of cities as historical districts to protect them from development.

So far we have discussed a timeline of how historic house museums evolved in the American public consciousness. We now need to focus on the underlying reasons of these movements. By looking at the factors and influences that were dictating the evolution of the historic house movement, we will obtain a more nuanced understanding as to why such institutions are so difficult to sustain. Tackling this issue is not an easy task as it is impossible to mention every influence that occurred during the times mentioned. In what follows, we shall take a closer look at key factors, including gender roles, social upheaval, political change and technological advancement.

### **Movements in House Museum Preservation**

When a house becomes a museum its function changes from one of domesticity to one which suits the current political issues that are meaningful to those pursuing preservation. The earliest establishment of house museums was a testament to the role of American popular history as it affected the future. Initially, the house museum movement was part of the women's sphere. During this time in American history women were relegated to roles of the home, and caretakers

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<sup>8</sup> "National Historic Preservation Act of 1966". National Park Service. April 2010 <<http://www.nps.gov/history/local-law/nhpa1966.htm>>.

of their children, who symbolized the future of the nation. Women were disenfranchised and often did not venture into the political arena. It was seen as acceptable social norm, even expected of the wealthy, for educated women to serve as moral compasses of society. One way they performed this expectation was by preserving and interpreting the houses of America's forefathers and using that interpretation as a moral compass for future generations. The thinking of the time that the lives of the colonial forefathers could teach future generations about freedom, allegiance, and offer a model for young people to follow in order to achieve greatness. It was also viewed as women's role to be the moral compass for their husbands and children. Together these ideas were exemplified into the tenets that formed the basis of a successful house museum. First a narrative needed to be created around the collection of objects, and the building itself. Second, the desire to make such museums accessible coincided with the goal of generating a civilizing effect on the populace and instilling a collectively shared history. Third, the phenomenon of the period room, though first used in German museums, ushered in a new interpretation format that fell comfortably into the realm of women's lives, which were responsible for the home. These were first initiated by the Mount Vernon Ladies' Association in its efforts to preserve Mount Vernon and are still used, though they have evolved in recent times.

In the mid-19<sup>th</sup> century women's societies fought to protect the houses of the great men in American history. By the early 20<sup>th</sup> century, preservation of historic sites became more political and therefore a more male-dominated sphere. Male politicians began to rally behind the forefathers to further their political agendas such as the movement to preserve Monticello, the home of Thomas Jefferson, in response to the reforming Democratic Party. Males also acted as museum professionals and board leaders since women had little or no access to such roles. This gender disparity continued well into the late 1930s as the President of the American Association

of Museums (AAM), Laurence Vail Coleman, writing in the first AAM publication to tackle the issue of historic house museums had this to say about the role of the curator in a historic house museum: “A curator is a person of refinement and education in historic house museums, usually a woman employed to carry on the work of the institution. She should become a student of the house and its history in order that she may interpret the place to the public and develop its usefulness to scholars...a curator should be a person with a good mind as well as a pleasing way...under the curatorship of a gifted and studious woman the meaning of a historic house unfolds day by day, the house fastens itself upon the imagination and interest of an ever-increasing number of visitors, and gradually the little institution takes on national importance and achieves permanence.”<sup>9</sup> Women had moved from the role of fighters for preservation to housekeeper/curator of the very museums they had fought to protect.

The mid-19<sup>th</sup> century was a tumultuous time for Americans. The Industrial Revolution prompted for changes to occur in agriculture, manufacturing, mining, telecommunication, and transportation. It allowed for the creation of super wealthy families such as the Rockefellers and Carnegies, and a growing middle class that had influence on consumer purchasing, and political power. Reform movements also brought about changes in the landscape of American consciousness. Abolitionists succeeded in efforts to pass emancipation laws, but the nation was deeply divided on the issue and the outbreak of the Civil War added to the turmoil that Americans were experiencing. Immigration issues also affected the American landscape. Massive waves of immigrants arrived on American soil, increasing the population, especially of urban areas, and bringing their culture and customs with them. The new arrival’s cultures and beliefs were removed from those that had come to America during earlier periods and threatened

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<sup>9</sup> Coleman, Laurence Vail. Historic House Museums. Baltimore, Md. Waverly Press, Inc. 1933.



the social fabric, a dynamic that is not so different from the immigration patterns we see today. Society searched for ways to control the various influences that prompted the changes in American landscape. Historic house museums and museums in general, were one way in which to provide the populace with a shared history; making them stakeholders in American political and popular culture and creating a desirable “American” citizen. Tourism was thriving in the 1800s with visits to new institutions, natural wonders, and pilgrimages to sites with historical associations becoming more of a leisure pastime. The Industrial Revolution brought about this tourism by creating disposable income and the better transportation hubs across a rapidly expanding United States.

It was not only immigration that threatened the status quo of American life, war erupted and the torn nation struggled to find common ground. Those who were on the forefront of preservation and interpretation of the founding fathers’ houses tried to provide that commonality. In the Reconstruction period after the Civil War more historic houses, not just those of colonial fathers, became the focus of preservation. The ability of historic house museums to create a shared heritage was seen several more times during conflict. The end of World War I brought a shift in the political sentiments of the United States. With museums and culture there was a shift away from European aesthetics toward an American-created boom in historic shrines and collecting of American antiquities. It was believed that these endeavors could install a behavior of hyper-nationalism, therefore creating an allegiance to the United States of America. The endeavors did create an allegiant behavior toward house museums and also shaped the attitude toward museum narrative focusing on the strong, male, head of the household omitting whole subsets of family and servants that also called the house a home. Post World War II prosperity

caused tourism to flourish due to increased transportation and the mass culture of automobiles. As a result, the number of historic house museums grew so as to cater to this new technology.

### **Organizations Involved in Historic House Museums**

The past 40 years has seen an increase of movement in the museum community to be more accountable to the public they serve. New museum theory focuses on the best practices that institutions can employ to stay true to their mission statement and benefit the community. This new idea has focused on how museums exhibit their collections, the gender discrepancies in the museum profession, the voice of indigenous peoples, and repatriation of stolen and looted artifacts, interpretation and narration of objects, transparency, and creating symbiotic relationships with the community the museum serves. It holds that, though museum workers commonly adapt their policies and procedures as professional practice, the decisions these workers make reflect underlying value systems that are encoded in institutional narratives.<sup>10</sup> Professional organizations such as the American Association of Museums, the American Association of State and Local History, International Council of Museums, United Nations, and various regional organizations have attempted to create best practices in all aspects of operating a museum. Other nonprofit organizations such as the National Center for Charitable Statistics (NCCS), and the Foundation Center have begun to study donation patterns, collect form IRS form 990s into a centralized database, and provide best practices to board members and volunteers on how to keep their organization functional. The NCCS is a clearinghouse of data on the nonprofit sector in the United States. The thesis departs here to focus on what these organizations provide as best practices before continuing on what this means for historic house museums.

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<sup>10</sup> Marstine, Janet. Ed. New Museum Theory and Practice: An Introduction. Malden, Ma. Blackwell Publishing. 2007.

The AAM's mission is to help institutions falling under the broad category of museums by disseminating standards and advancing best professional practices in the field. These standards correspond to both the legal issues common to all museums and set a high ethical standard that museums should follow to guarantee their assets. Operating since 1906, the AAM has been on the forefront of developing standards and best practices as well as providing advocacy on museum issues. In 1933 Laurence Vail Coleman, Director of the AAM, recognized in his book Historic House Museums that historic house museums were growing and that a set of guidelines had to be established in order to sustain the museums for the future. As of 2010 the AAM represents over 15,000 individual museum professionals and volunteers, 3,000 institutions exemplifying a wide spectrum of museum types, and 300 corporate members. AAM has guidelines in place covering every aspect of museum operations from collections care to volunteers. Though the AAM does not have legal authority to enforce laws they are considered the standard in museum best practices and are the go to agency when crisis and conflict affect an institution, they also have a strong lobbying presence in the nation's capital. An important function of the AAM is its accreditation of museums based on its ability to meet the standards set forth by the Accreditation Commission. The main standards put forth by the AAM state that a museum should be a good steward of its resources held in public trust, identify the communities it serves, and have a clear understanding of its mission and its governance, staff and volunteers. In addition the museum must effectively advance the mission of the institution, legally, ethically, and effectively manage documents and care for the collection, responsibly manage and allocate its financial resources to advance mission, and operate in a fiscally responsible manner to promote long-term sustainability. Out of the 3,000 institutions that are members of the American Association of Museums only 779, or 26%, are accredited. The AAM does not discern between

historic house and historic site in its accreditation process. Annual statistics on the AAM's accreditation program ending December 31, 2009 shows an unsettling picture of historic house museum representation.

According to the statistics provided in January 2010 of the 779 accredited museums only 9% were historic house/sites. A list of accredited museums provided on the AAM website return 65 historic house/sites representing 24 states and the District of Columbia. By comparison history museums accounted for 23% of the museum types accredited and art museums/centers composed 42% of the AAM accredited museums. A more disturbing trend was the fact that out of the total museums accredited 48% had a budget of \$500,000-2.9 million dollars, and 37% had a budget between \$3 million to over \$15 million dollars; for a combined total of 75% operating with budgets over \$500,000. Accreditation status by the AAM is a hallmark museums aspire too but often it is an unattainable achievement for midsize and smaller museums with limited funding for day to day operation. The fact that 75% of accredited museums have annual budgets over \$500,000 indicates that smaller institutions will probably never have enough funds available to gain accreditation status. Other trends in accredited museums in 2009 were that the largest governance type was private nonprofits 63%, with 49% having a full-time staff numbering 6-30<sup>11</sup>. This information seems to show how the accreditation process is skewed toward large, well-funded, highly staffed museums that have the resources to provide care for collections and the museum itself, and not the typical standard operation procedures for smaller museums.

Though information about accredited museums is available from the AAM the listing is far from complete. This fact is one reason that it is difficult to put an exact number on historic house museums operating in the United States. Comparing the AAM listing to the National

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<sup>11</sup> See appendix B for statistics.

Center for Charitable Statistics (NCCS) which keeps detailed databases on nonprofit organizations one can quickly see how under-represented historic house museums, and in general accredited museums are. A basic search on the NCCS website for museums yields over 8800 returns. If one factors into this the number of historical organizations, societies, and historical preservation organizations, which are the nonprofits most likely to be directly involved with historic house museums, the number rises close to 33,200 organizations. This statistically shows that only 9% of all museums registered with the IRS are accredited by the American Association of Museums. Factoring in the number of historical organizations, societies and historic preservation organizations listed in the NCCS database the percent decreases from 9% to only 2% of historic house museums and the organizations associated with their preservation are accredited.

In the past few years the AAM has launched the Center for the Future of Museums (CFM) to explore the cultural, political, and economic challenges facing museums and devise strategies to help museums transcend these boundaries to serve the community. It was cultural, political, and economic changes that brought about the proliferation of historic house museums and museums as a whole during the early to mid-twentieth. Now in the 21<sup>st</sup> century these same factors are causing museums to rethink their daily operations in order to accommodate the rapid changes in culture, politics, economics and technology. The CFM is the think tank of the American Association of Museums and brings about its discussion of the future of museums through lecture, discussion, and a multiplayer forecasting game called *Superstruct* which allowed players to imagine the museum world in 2019 and attempt to solve the problems being faced. In 2007 it asked AAM members what were the most significant challenges facing museums in the next few years. The top four challenges were: funding, technology, leadership, and maintaining

public relevance in the face of shifting social and cultural changes. The American Association of State and Local History (AASLH) is more focused than the AAM on the operation of historic house museums. AASLH is rooted in the rise of historical houses and sites in the late nineteenth and early twentieth century. As early as 1904 this group, under the title American Historical Association was a professional body serving the leaders of historical societies nationwide. By the end of 1940 the American Association of State and Local History was chartered with the purpose to promote activity in the fields of state, provincial, and local history in North America. Today the organization provides services to over 6,400 institutions and individuals members nationally. Its mission is still to provide leadership and support for its members working in preserving and interpreting history for all Americans. Realizing that the majority of historic organizations in the United States are small, volunteer staffed organizations with limited budgets and professional staff the AASLH tailors their services to the roughly 80% of their members that fit this category. The organization also recognizes that historic houses are among the most numerous museums in the country and have created programs that target these institutions. Services offered include technical resources including kits, leaflets, reports, and a lending library, publications, professional development workshops, on-call centers to direct members to appropriate resources, online workshops, performance management assistance, advocacy, and professional training.

The most recent program developed by AASLH is the Standards and Excellence Program for History Organizations StEPs program, which is a voluntary, self-assessment program for small and mid-sized museums, historic houses, and other historic organizations. Using assessment questions and performance indicators to rate the policies and practices in six standard sections it is hoped that the organization will be able to clearly identify and document strengths

and areas that need to be improved so that the institution can make a positive change for sustainability. Programs offered strictly for historic house museums by the AASLH include the technical leaflet “Is Your Historic House Museum Sustainable?” which offers the top characteristics of a sustainable historic house museum. These guidelines resemble the AAM accreditation guidelines, but they are broader in scope. According to the AASLH there are eleven characteristics of a sustainable house museum. These characteristics can be condensed into four main factors that influence the sustainability of historic house museums. First a sustainable historic house museum must serve its audience, be valued by and inspiring to the community which it is located. Second the leaders adhere to a standard of excellence; embrace learning and inquiry are proactive managers and stewards of the building, collections, and landscape. Museum leaders are strategic in their thinking and activities. Third the museum connects to outside groups and individuals of professionals that make decisions in the community. Fourth museums are interpreted in innovative ways that extend beyond the traditional house tour and programs are developed in conjunction with new sources of revenue. Museums adapt to current technologies to improve efficiency and effectiveness and market themselves in consistent language. To facilitate the historic house museum to conduct a self-evaluation of itself based on the characteristics the AASLH has a checklist that focuses on vision and mission statements, board and staffing issues, financial, programs, collections, and communications. Though these characteristics and checklists are provided there is not much discussion on how to use this resource successfully.

The plight of museums, small and large, is not only a problem in the United States. Globally the issues of museums and preserving the culture of those who often have been subjugated have gone unnoticed. There are some organizations, the largest being The United

Nations Educational, Scientific and Cultural Organization (UNESCO) that work around the globe to protect cultural resources through the World Heritage initiative. The organization encourages the identification, protection, and preservation of both cultural and natural heritage that is considered to be of outstanding value to humanity and is embodied in an international treaty adopted in 1972. With its global scope it is not that applicable to historic houses in the United States, however Monticello, Thomas Jefferson's home, is co-listed with the University of Virginia (designed by Jefferson) on the exclusive World Heritage List. The historic site was added to the list in 1987 with a statement of significance attesting to Thomas Jefferson's talent as an architect, contribution to neo-classicism, and the buildings are directly associated with the ideas and ideals of Thomas Jefferson.<sup>12</sup> As previously mentioned, great historical forefathers are one reason that historic houses become museums.

Another organization that provides guidelines for historic house museums and historic homes in general is the National Trust for Historic Preservation (NTHP). The NTHP advocates for sustainable development in historic preservation by conservation and improvement of the existing built resources which includes re-use of historic buildings, the greening of existing buildings, and reinvestment in historic communities. A position statement on its website discusses the organization's stance on deconstruction of historic buildings. Deconstruction is defined as the disassembly of structures for the purpose of salvaging the structures components and building materials; basically recycling. The NTHP supports the concept of deconstruction but only as last resort when continued or adaptive use is not possible. They propose two

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<sup>12</sup> "World Heritage Monticello and the University of Virginia in Charlottesville". United Nations Educational, Scientific and Cultural Organization. April 2010  
<<http://whc.unesco.org/en/list/442>>.



alternatives before deconstruction: reuse and repair of the building in its existing location, and moving the building to a new location. Both of these alternatives will be discussed in later chapters as alternatives to keep historic house museums open.

The National Register of Historic Places, part of the National Park Service and authorized by the National Historic Preservation Act of 1966, is the official listing of the nation's historic places that are worth preserving. SHPOs review nominations submitted by states, tribes, and other federal agencies and list eligible properties in the National Register. They also offer guidance on evaluating, documenting, and listing different types of historic places through publications. In addition to those services listed above SHPOs help qualified historic properties receive preservation benefits and incentives, and manage the national historic lighthouse preservation program that transfers historic federal light stations to new owners. State historic preservation offices also sponsor the cultural resources diversity program to diversify historic preservation and cultural resource management. To be considered for the National Register of Historic Places a property must meet specific criteria. These criteria are similar to the founding tenets that created historic house museums in the first place. The first criteria is the age and integrity of the property. The property must be at least 50 years old and resemble what it looked like in the past. A second criterion is significance; the property must be associated with events, activities, developments that were important in the past. The lives of important people in the past, significant architectural history, landscape history, and engineering achievements factor into the significance criteria as well. The final criteria is if the property has the potential to yield information through archaeological investigation about our past.

Listing in the National Register of Historic Places provides a formal recognition of the property's significance but there are several things that a listing will not do. Being on the NRHP

## **CHAPTER IV – Solutions for Historic House Museums**

Traditional methods for sustainability consist of grants, charitable giving, fundraising, and earned income, but these methods cannot always keep the historic house museum from closing its doors. Other methods, though difficult for some in the museum field to conceive, are available and can be applied to house museums. Mergers and asset transfers, reuse including study houses and reprogramming for mission based use, co-stewardship agreements, resident curatorship, sale to another nonprofit organization or private individual with protective easements, long and short term leases to a for-profit entity for adaptive use, and community revitalization uses such as affordable housing units, artist spaces, and commercial ventures. Each of these ‘nontraditional’ methods will be discussed below with the pros, cons, and ethical considerations of each solution compared to the standards set forth by professional organizations and the legislation. The following review explores whether these solutions are feasible for small historic house museums.

### **Merger and Asset Transfer**

Merger and asset transfer are used to maximize finances and efficiency among similar nonprofit organizations. It is a way to gain new leadership, identify new funding sources and create new opportunities by utilizing the strengths of both institutions to create the best possible model. A merger is created when one organization merges with another organization where there is a transfer of all assets and liabilities which are absorbed into the surviving organization. Once the merger is complete the non-surviving organization goes out of existence. Consolidation is a type of merger where two or more organizations combine and form a new entity. Asset transfers can affect tangible property such as money, whereas intangible assets may consist in a name and its associated reputation. The purchase can be in cash but often it is for a commitment to

continue the organization's mission. These solutions can be useful in areas of saturation where resources and visitors are scarce, or in organizations where the board is aging out and there has not been recruitment of new members. Issues that need to be thoroughly explored before utilizing this solution include: the fit between the missions and programs of the merging organizations, the impact of a merger on program services and funding, and differences in institutional cultures.<sup>17</sup> In order for a successful merger, consolidation, or asset transfer the board must begin by having dialogue with an attorney who can inform them of the state's laws on mergers. Laws will vary by state or territory so it is crucial for the board to know what is and is not permissible if they want to continue in their duty of due diligence. Once the applicable laws are known the board is required to create a detailed plan of merger/consolidation, distribute it to the voting members of the organization for review and then approve the plan by vote. The merging, consolidating, or asset transfer of a nonprofit organization also involves notifying the Internal Revenue Service of the details of the action with a Form 990.

There are some disadvantages of this type of solution for historic house museums. These include: expense of obtaining legal counsel, a time consuming process with the possibility of taking several years before the solution is realized, and changes in unrelated business income status. Mergers combine staff, space, and resources which can be both a strength to the surviving organization or a weakness. It is always a possibility that the merger of resources could negatively affect morale and creates friction among the board and community as differing views of how best to allocate resources emerge. There are ways to diminish the possible negative response, the most important being to have transparency, a detailed merger plan, and open communication among all parties and the community. The AAM does not have specific

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<sup>17</sup> <http://www.compasspoint.org/boardcafe/details.php?id=15>. Accessed 6/27/2010.

guidelines on mergers but the organization's museum resources information center lists a variety of articles on the subject. It is possible that the AAM, realizing that state and federal legislation is required for this solution does not actively involve itself with legalities as that would be outside the scope of their mission.

Merger was successfully used in Philadelphia when the Cliveden and Historic Upsala Foundation began talks in 2000. In 2004 the Historic Upsala foundation dissolved, transferring the house, assets, and liabilities to Cliveden, Inc. Asset transfer has been successful in the solution of the Margaret Mitchell House and Museum and the Atlanta History Center in Atlanta, Georgia. The Creative Discovery Museum and the Hunter Museum of American Art in Chattanooga, Tennessee successfully managed to consolidate administratively with the Tennessee Aquarium while retaining their separate identities.

### **Reuse**

Finding a new or different use that fits the house with respect to architectural and historical qualities is called reuse. There are factors that will affect how feasible this solution is for a historic house museum; these being the size of the house, condition of the building, location, planning and zoning issues. Another factor to consider when thinking about the reuse option is whether the organization plans to retain ownership of the building or not. If the organization has decided to retain ownership there are four options available: study house, reprogramming for mission-based use, co-stewardship, long- or short-term lease agreement.

A study house is a house museum that is restored using collections with specific provenance to the building, opened to scholars by appointment, and to the public on a limited basis. This solution will only work if the structure is well maintained, has a significant historic collection or architectural feature that needs to remain in the public's trust, and the board desires

to continue the management and maintenance of the property and has the funding to manage it. Reprogramming for mission-based use is the second option available to the organization that wishes to retain ownership. In mission-based use the property is no longer interpreted as a house museum but reprogrammed for a use that fits within the mission of the nonprofit organization. Some examples are staff housing, offices, artist spaces, and storage.

If the board decides to keep the mission of the structure as a historic house museum, then the option of entering into a co-stewardship or cooperative relationship with another organization or private individual can be discussed. In a co-stewardship solution the organization in crisis seeks a partner to take over management of the house on a short or long-term lease but still retains ownership of the property.<sup>18</sup> The use as a historic house museum does not change, but the daily management falls to another house museum organization. Co-Stewardship takes considerable energy as there needs to be a clear and concise agreement detailing who will take responsibility of maintenance, restoration, and management of the property, the duration of such an agreement, and that the goals of both organizations are mutual in wanting to preserve and maintain the building and collection. As with merger and asset transfer an attorney needs to be retained. A long or short-term lease to a for-profit entity for an adaptive (non-museum) use allows the house museum organization to retain ownership of the property but a new user from the for-profit sector utilizes the property. Often the new use still allows the public limited access to the site. Some examples of this type of solution are operating the house as a bed and breakfast or wedding destination. The only limitations are planning and zoning issues. This option can be extremely difficult for boards to navigate as various legal issues would have to be worked out prior to an acceptable contract and the unforeseen incidents that could arise threatening the

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<sup>18</sup> Harris, Donna. *New Solutions for House Museums: Ensuring the Long-Term Preservation of America's Historic Houses*. Lanham: AltaMira Press, 2007.

historic house. To remedy this, the board can offer restrictions on the property; however the nature of the restrictions might make it difficult to find a private stakeholder.

### **Sale or Donation of Property with Protective Easements**

If the board no longer wishes to retain the property, the options available are sale or donation of the property with protective easements. This solution has three possibilities available: sell the house to a private owner with easements, sell to a nonprofit organization with easements, or donate the site to a governmental or other nonprofit entity.<sup>19</sup> The most current literature and preservationists agree that if any of these options are utilized it is highly recommended to include protective easements to prevent demolition or insensitive alteration to the structure. An easement is legally defined as an enforceable preservation agreement between a landowner and a government agency or qualified land protection organization for the purposes of conservation. Easements are the only way to make certain that once the historic house leaves the board's property that the house is protected. Sale is typically viewed by the community and those closely associated with historic preservation as the last option and one that has the potential to destroy the historic property. However, the private interest may have the resources necessary, and the desire to ensure preservation of the building. The board will need to carefully research the credentials of any private buyer before they consider selling due to the permanence of the situation. It is best to seek offers from nonprofit organizations first and publicize the decision to sell in the community. Transparency is important if the organization wants to maintain its standing in the community. Legal counsel will also need to be retained concerning the organization's bylaws and in the selling process. The proceeds from the sale of the building cannot go to the board; they must be redistributed back into the community as a mission-based

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<sup>19</sup> Harris, Donna. *New Solutions for House Museums: Ensuring the Long-Term Preservation of America's Historic Houses*. Lanham: AltaMira Press, 2007.

use such as historic preservation or educational uses. It is extremely important to restate that the sale cannot benefit anyone associated with the historic house organization. The state attorney general will need to be involved in setting up policy for the redistribution of proceeds from the sale and in deaccessioning details. Notification to the IRS will also be the responsibility of the board.

Sale or donation of the historic property with protective easements can be very expensive, with legal obligations and time consuming, taking years in some cases. Another variation on sale is selling the property to a nonprofit organization with easements. In this solution the historic house museum is sold to an organization that is able to manage the site more efficiently than the previous owner. Typically these types of sales are referred to as bargain sales as the purchasing nonprofit does not pay market value for the property. The seller can also sell the property and contents to the nonprofit for a nominal fee. Once the sale is complete the former organization is dissolved, after paying all bills and filing the appropriate documentation for dissolution. The new organization gets any endowment or other funds from the dissolving organization to help maintain the property over time. Even though the property is transferred to another similar nonprofit, it is a good idea to place protective easements in the contract. The proceeds should be donated to a community foundation or a trust fund created to maintain the property.

A third variation of sale is donation of the property to a governmental or other nonprofit entity. This solution has the historic house museum donated to a public sector entity that has the resources to maintain the building. Legal counsel by an attorney and the attorney general will have to be sought for this option. Protective easements attached to the property might make it difficult to find a suitable public sector organization to take on the building. Another problem with this solution is that public organizations change administrations over time and the property

may not always be in the best interest of the organization. In difficult financial times funding to support and maintain the building may dry up and the building will be lost or neglected. Donation is not often the best option for historic property.

### **Resident Curatorship**

A unique twist on the long-term lease option is that of resident curatorship. This is a public-private partnership that allows state-owned historic properties to be restored at virtually no cost to taxpayers by bringing in private citizens to pay for restoration, rehabilitation and maintenance. The public organizations responsible for this in most states are the National Park Service and state historic preservation office (SHPO). Resident curatorship was first pioneered in Massachusetts for deteriorated historic properties on public land, and then adopted by the Maryland Department of Natural Resources. It is this program that has been the foundation of other states interested in creating their own resident curatorship programs. This approach was adopted by Maryland-National Capital Park and Planning Commission (M-NCPPC) to help maintain the 50 historic sites that are state-owned. Resident curatorships work in general by first identifying properties that are historically significant but in poor condition and require extensive rehabilitation that the owning organization, usually public, cannot provide. Once these properties are identified, the public organization running the program releases the information of which sites are available to the public and an open house is conducted of the site. After the open house the interested party submits a proposal which is reviewed by the issuing entity. Once the private party is accepted as curator, he or she enter into a long-term lease .Each participating state in this program will have varying guidelines on proposal submission, lease terms, easements, and financial stipulations.<sup>20</sup> This solution benefits the public because the home is restored and

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<sup>20</sup> See appendix A for Maryland's requirements.



maintained at no cost to the taxpayer; the resident curators reap the benefit of a long-term residency in a restored structure and do not have the burden of rent, mortgage, or property taxes.

### **Community**

Falling under a category of reprogramming and reuse is the movement occurring in cities around the nation of converting their deteriorated historic neighborhoods into viable community commodities. The phrase “historic neighborhoods” refer to buildings constructed prior to 1950. In the final report by the Millennial Housing Committee in May of 2002 it stated that the “housing policy must recognize that preservation is cheaper than new construction, that the rehabilitation and preservation of units returns the units to low-income families faster than new construction can provide such units, and that maintaining and renovating existing units combats blight and contributes to healthy communities.”<sup>21</sup> Statistics compiled in 2002 by Donovan D. Rypkema for the National Trust for Historic Preservation shows the significance of historic houses especially for the minority and elderly population. According to his statistics 32% of households below the poverty line live in historic or older homes, 31% of homeowners and 34% of renters making \$20,000 or less a year live in historic homes, 31% of African American homeowners and 24% Hispanic homeowners live in historic homes, 29% of elderly homeowners live in historic homes. Other statistics mentioned in his report include 53% of all owner-occupied historic homes have monthly housing costs under \$500, and 48% of older homes rent for under \$500 a month.<sup>22</sup> We have learned a lot in the housing crisis that has occurred in the past three

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<sup>21</sup> Millennial Housing Commission. "Millennial Housing Commission Reports to Congress". Millennial Housing Commission. June 2010 <<http://govinfo.library.unt.edu/mhc/news.html>>.

<sup>22</sup> Rypkema, Donovan D. Historic Preservation and Affordable Housing: The Missed Connection. National Trust for Historic Preservation. 2002.

years and more communities are realizing the potential in their historic neighborhoods. Locally the nonprofit organization HANDS (Housing and Neighborhood Development Services, Inc.), located in Orange, New Jersey has completed projects in the Oranges. Founded in 1986 by a group of clergy and community leaders to ensure that the neighborhoods of Orange and East Orange remain good places to raise a family, the mission of HANDS is to revitalize neighborhoods through the high-impact development of vacant, troubled properties.<sup>23</sup> These properties are often historic, one of the oldest to be renovated being the Chronicle Building in Orange built in 1903 and now housing offices, a restaurant, and new businesses. The organization has also purchased and renovated historic houses on Snyder Street and Berg Place in Orange turning them into affordable houses for homeowners. They are supported by public agencies, private foundations, corporate sponsors and even the businesses that they have brought into the neighborhoods. The National Trust for Historic Preservation also advocates low income affordable housing by working with community leaders to strengthen older communities through the rehabilitation, adaptive reuse, and development of housing for a broad income range of buyers and renters. Their position is that while rehabilitation and reuse of older properties continues to be their preferred method of operation, they realize that in some situations the loss of structures has been so substantial that new construction is needed to rebuild the community.

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<sup>23</sup> Housing and Neighborhood Development Services, Inc.. "H.A.N.D.S.". Housing and Neighborhood Development Services, Inc.. June 2010 <<http://www.handsinc.org/>>. Accessed June 27, 2010.

## Chapter V - Conclusion

A historic house museum is a single residential structure or a complex of structures that is interpreted around the lives of the past occupants. They follow the general definition of a museum by maintaining, caring for and interpreting their collections that have been entrusted to them for perpetuity. Hasbrouck House was the first historic house was purchased for preservation and was acquired through the efforts of the New York government in 1850. The rationale for preservation of Hasbrouck House is the main reason used today to preserve historic houses and can be best stated by Hamilton Fish, governor of New York at the time the house was purchased. "I respectfully submit that there are associations connected with this venerable edifice which are above the consideration of dollars and cents."<sup>24</sup> A decade later, preservation of historic sites was taken out of the government realm and became the cause of patriotic women's societies. The first women's organization was the Mount Vernon Ladies Association which raised funds and acquired Mount Vernon. This organization created a template for which preservation and interpretation of historic house museums would follow well into the 21<sup>st</sup> century. In the late 19<sup>th</sup> to early 20<sup>th</sup> century historic preservation was almost synonymous with the historic house museum, and this idea led to an excess of house museums that we find today. During the mid-20<sup>th</sup> century government became more interested in preservation creating jobs in preservation, and passing legislation to ensure that as America grew, historic sites would be protected. After World War II returning soldiers, having been exposed to historic buildings in Europe, came to appreciate the buildings in their own community and began fighting for preservation. Increased wealth and leisure time, along with the baby boom created a demand for

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<sup>24</sup> Donnelly, Jessica Foy. *Interpreting Historic House Museums*. Walnut Creek: AltaMira Press, 2002.

quality educational and cultural activities. All these factors led to a surge of historic house museums.

Those that establish a historic house as a museum need to consider that the work is only beginning once the preservation is complete. A historic house museum needs continual funding, an experienced and energetic board, and a community that values the historic property in order to be successful. Professional organizations have taken on the task of providing support to historic house museums. The American Association of State and Local History (AASLH) initiated a series of technical leaflets dealing with a wide range of topics in management and care of historic structures, offers educational seminars and courses, and disseminates information about current research in the field. Serving all museum types, the American Association of Museums has developed technical support information for historic house museums made public through the monthly AAM magazine *Museum News*.

The challenges facing historic house museums are; board dynamics, changing demographics, funding, technology, interpretation, and maintenance issues. Technology is changing especially in areas of interpretation, management, and conservation. Growing diversity is challenging museums to remain relevant and mission focused. Funding remains difficult, especially in this time of financial uncertainty. As the board ages it is often difficult to recruit new leadership. Having the institution ready for the transition of new board members can ensure the continued success of the museum. The understanding of the past is constantly changing and if a historic house museum does not remain relevant to the evolving methods and trends in interpreting the past then they run the risk of not surviving. However there are solutions available that the board can utilize to sustain their institution. Each of these solutions has their pros and cons and must be considered within an ethical framework when being applied. Merger and asset

transfer are used to maximize finances and efficiency among similar nonprofit organizations. Merger was successfully used in Philadelphia when the Cliveden and Historic Upsala Foundation began talks in 2000. There are some disadvantages of this type of solution for historic house museums. These include: expense of obtaining legal counsel, a time consuming process with the possibility of taking several years before the solution is realized, and changes in unrelated business income status. However if executed correctly then the strength of combining staff and resources can protect the historic house museum and increase productivity. Reuse is when the organization fits the historic house with respect to architectural and historical qualities to another purpose that remains within the mission of the organization. This solution will only work if the structure is well maintained, has a significant historic collection or architectural feature that needs to remain in the public's trust, and the board desires to continue the management and maintenance of the property and has the funding to manage it. An example is a study house, restored using collections with specific provenance to the building, opened to scholars by appointment, and to the public on a limited basis. Sale or donation of the property with protective easements has three possibilities available: sell the house to a private owner with easements, sell to a nonprofit organization with easements, or donate the site to a governmental or other nonprofit entity. Sale is typically viewed by the community and those closely associated with historic preservation as the last option and one that has the potential to destroy the historic property. The board needs to carefully weigh the credentials of any private buyer before they consider selling due to the permanence of the situation. Transparency is important and legal counsel will also need to be retained concerning the organization's bylaws and in the selling process. Resident curatorship is a public-private partnership that allows state-owned historic properties to be restored at virtually no cost to taxpayers by bringing in private citizens to pay for

restoration, rehabilitation and maintenance. This solution benefits the public because the home is restored and maintained at no cost to the taxpayer; the resident curators reap the benefit of a long-term residency in a restored structure and do not have the burden of rent, mortgage, or property taxes. Statistics compiled in 2002 by Donovan D. Rypkema for the National Trust for Historic Preservation shows the significance of historic houses especially for the minority and elderly population. This method of returning the historic property into community functions is catching on across America and though expensive, represents the best solution for the property and community.

It has been suggested that unless a historic house museum has a continuing cadre of professionals, an endowment, and a demonstrated program of caring for the structure and collections that it may well be faced with closing.<sup>25</sup> As this paper has shown it is a very difficult task for small historic house museums to have this combination and that other solutions can be offered to keep them sustainable.

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<sup>25</sup> Donnelly, Jessica Foy. *Interpreting Historic House Museums*. Walnut Creek: AltaMira Press, 2002.

## APPENDIX A

### NTEE Classification and Description of Museums

**A54 - History Museums** - Organizations that acquire, preserve, research and exhibit collections of objects including documents, tools, implements and furnishings that have significance in helping to interpret or understand the past. History museums may specialize in a specific era such as early Greece or Rome, a particular geographical region such as California or Appalachia, a particular ethnic or cultural group such as Native Americans or a specific subject area such as costumes; and may contain items created or used by contemporary or historical figures.

**A56 - Natural History & Natural Science Museums** - Organizations that acquire, preserve, research and exhibit collections of objects that have significance in the natural sciences including botany, zoology, geology and physical and cultural anthropology.

**A80 - Historical Organizations** - Private nonprofit organizations whose primary purpose is to promote appreciation for and enjoyment and understanding of the visual, performing, folk, and media arts; the humanities (archaeology, art history, modern and classical languages, philosophy, ethics, theology, and comparative religion); history and historical events; and/or communications (film, video, publishing, journalism, radio, television).

**A82 - Historical Societies & Historic Preservation** - Organizations that interpret, collect and preserve the historical heritage of a specific geographic location.

#### Description of Organizations Supporting the Arts, Culture and Heritage Subsector

**National Endowment for the Arts (NEA)** supports individual and group efforts to achieve excellence in the arts and promotes artistic endeavors as an avenue to serving the American public. Specific programs enhance personal development in the arts, arts education, preservation of American arts heritage, expansion of the arts to under-served regions and populations, and investigation of non-Federal sources for support of national arts activities (Americans for the Arts website 2009).

**National Endowment for the Humanities (NEH)** supports activities designed to promote national progress in the humanities. Specific programs are aimed at improving the quality of humanities scholarship, the preservation of national humanities resources, and increasing the accessibility of the humanities to the American public (Americans for the Arts website 2009).

**The Institute of Museum and Library Services (IMLS)** is an independent federal agency dedicated to creating and sustaining a nation of learners. Its **Office of Museum Services (OMS)** awards grants to museums to carry out their public service, educational, and conservation roles in connecting the whole of society to the cultural, historical, and scientific understanding that constitute our heritage. OMS supports all types of museums including art, history, science, children's, specialized institutions, and living collections such as zoos and aquariums. (Americans for the Arts website 2009).

The Museum Services Act provides the Institute of Museum and Library Services (IMLS) with a broad framework to achieve specific outcomes. As cited in the statute (20 U.S.C. §9171), federal funds allocated to IMLS are directed to museums for the following purposes:

1. To encourage and support museums in carrying out their public service role of connecting the whole of society to the cultural, artistic, historical, natural, and scientific understandings that constitute our heritage.
2. To encourage and support museums in carrying out their educational role as core providers of learning and in conjunction with schools, families, and communities.
3. To encourage leadership, innovation, and application of the most current technologies and practices to enhance museum services.
4. To assist, encourage, and support museums in carrying out their stewardship responsibilities.
5. To achieve the highest standards in conservation and care of the cultural, historic, natural, and scientific heritage of the United States to benefit future generations.
6. To assist, encourage, and support museums in achieving the highest standards of management and service to the public, and to ease the financial burden borne by museums as a result of their increasing use by the public.
7. To support resource sharing and partnerships among libraries, schools, and other community organizations (IMLS website 2009).

**The National Center for Charitable Statistics (NCCS)** is the national repository of data on the nonprofit sector in the United States. Its mission is to develop and disseminate high quality data on nonprofit organizations and their activities for use in research on the relationships between the nonprofit sector, government, the commercial sector, and the broader civil society. Working closely with the IRS and other government agencies, private sector service organizations, and the scholarly community, NCCS builds compatible national, state, and regional databases and develops uniform standards for reporting on the activities of charitable organizations. The Center was established in 1982 and has been a project of the Center on Nonprofits and Philanthropy (CNP) at the Urban Institute since July 1996, when it was transferred from the research division of Independent Sector.

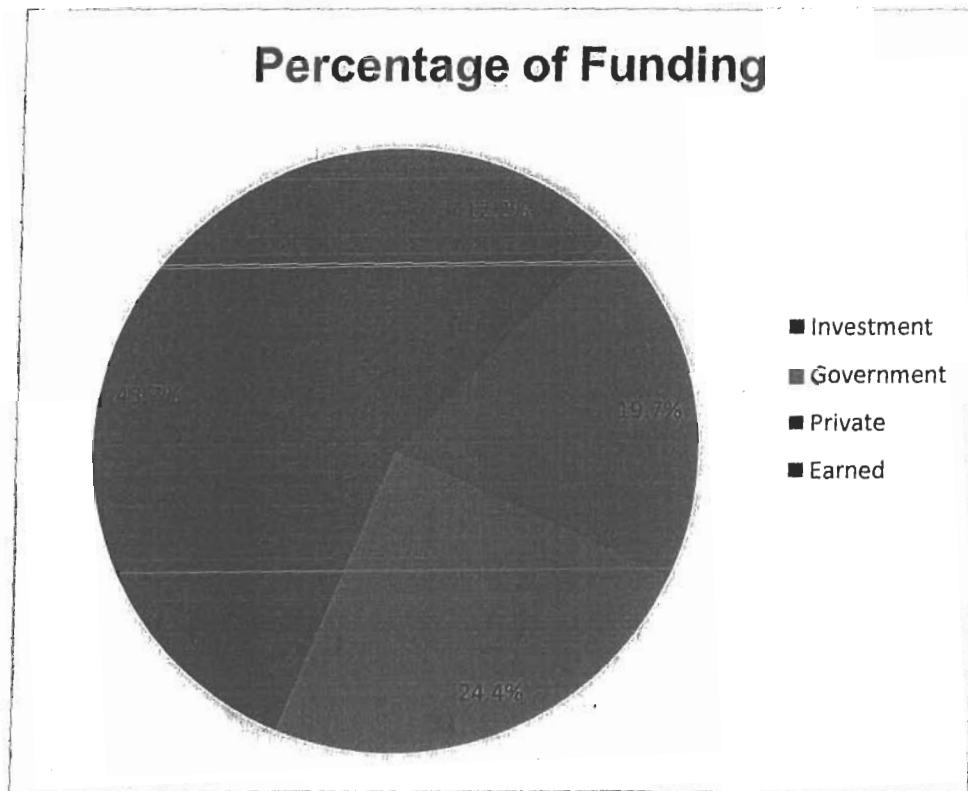


## **Maryland Curator Program**

<http://www.dnr.state.md.us/land/rcs/policies.asp>

1. A curatorship proposal must represent at least \$150,000 worth of improvements to the property. Certain properties may require a significantly greater investment.
2. Improvements must be completed within seven years.
3. The curatorship is subject to regular inspection by state officials, and can be terminated for non-compliance.
4. Resident-Curators agree to open the property to the public three to five times each year.
5. Restoration standards must comply with "The Secretary of Interior's Standards for Historic Preservation."
6. Minors cannot be parties to a Curatorship Lease Agreement.

APPENDIX B  
Graphical Data of Accredited Museums (AAM)



**Percentage of funding sources for museums.**

Source: Urban Institute analysis, IMLS Museum Public Finance Survey, 2008.

### Museum Type Filing Form 990 and Revenue Reported

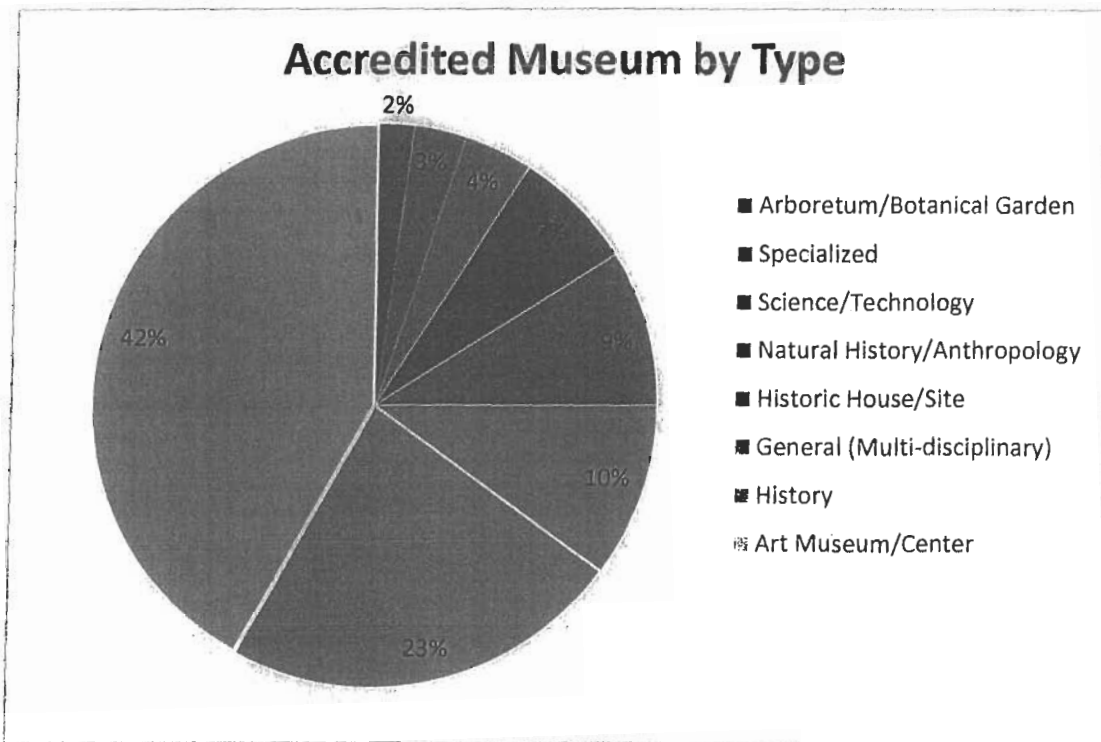
Museum Type	Number of Organizations Filing	Number Filing Form 990	Total Revenue Reported on Form 990	Assets Reported on Form 990
Museums (General) NTEE Code A50	5,019	3,215	1,890,783,580	7,326,882,766
Art museums NTEE Code A51	776	653	3,785,324,106	22,290,829,027
Children's museums NTEE Code A52	285	229	342,768,298	1,393,234,294
Folk Art museums NTEE Code A53	153	136	187,677,375	963,774,670
History museums NTEE Code A54	2,197	1,775	933,020,952	5,269,525,182
Natural History museums NTEE Code A56	148	127	766,315,524	3,771,768,416
Science and Technology museums NTEE Code A57	242	185	630,099,393	2,052,718,165
Historical organizations NTEE Code A80	13,840	9,714	1,177,631,468	5,958,689,728
Historical societies and historical preservation NTEE Code A82	10,535	7,406	1,171,927,405	5,099,756,664
<b>Total</b>	<b>33,195</b>	<b>23,440</b>	<b>10,885,548,101</b>	<b>54,127,178,912</b>

Source: NTEE

**Primary Type of Museum Accredited by the American Association of Museums 2010**

<b>Primary Museum Type</b>	<b>Percent</b>
Aquarium	<1%
Nature Center	<1%
Zoological Park	<1%
Children's/ Youth	<1%
Arboretum/ Botanical Garden	2%
Specialized Museum (e.g. railroad, music, aviation)	3%
Science /Technology Museum/Center (includes Planetariums)	4%
Natural History/Anthropology Museum	7%
Historic House/ Site	9%
General (Multi-disciplinary)	10%
History Museum	23%
Art Museum/Center	42%

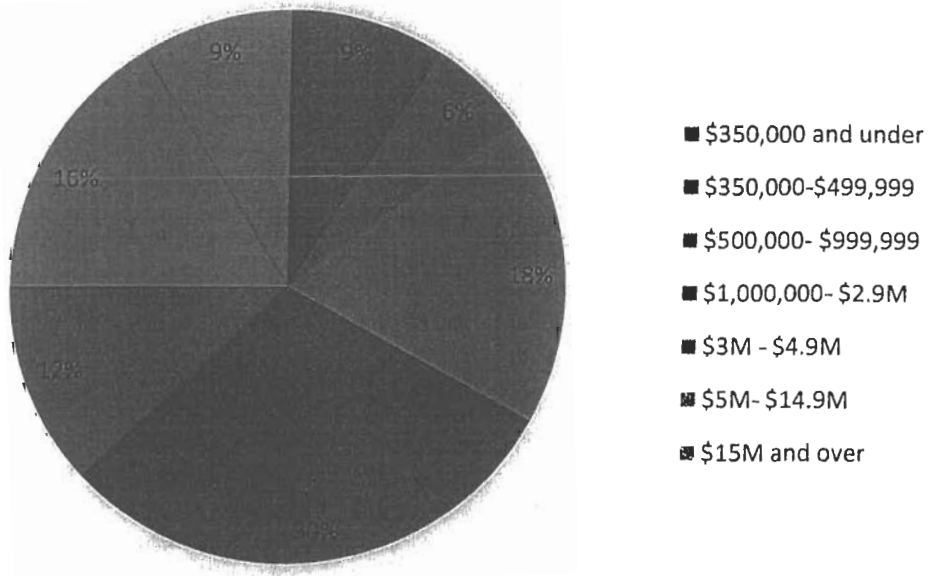
Source: AAM



Budget % of accredited museums	Percent
\$350,000 and under	9%
\$350,000-\$499,999	6%
\$500,000- \$999,999	18%
\$1,000,000- \$2.9M	30%
\$3M - \$4.9M	12%
\$5M- \$14.9M	16%
\$15M and over	9%

Source: AAM

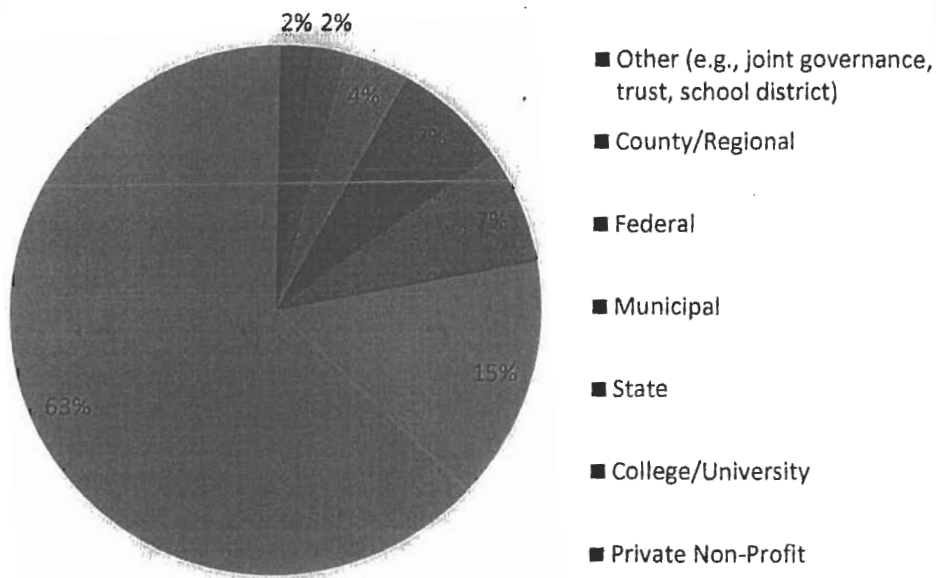
### Accredited Museum Budgets



Governing Authority % of accredited museums	Percent
Tribal	<1%
Other (e.g., joint governance, trust, school district)	2%
County/Regional	2%
Federal	4%
Municipal	7%
State	7%
College/University	15%
Private Non-Profit	63%

Source: AAM

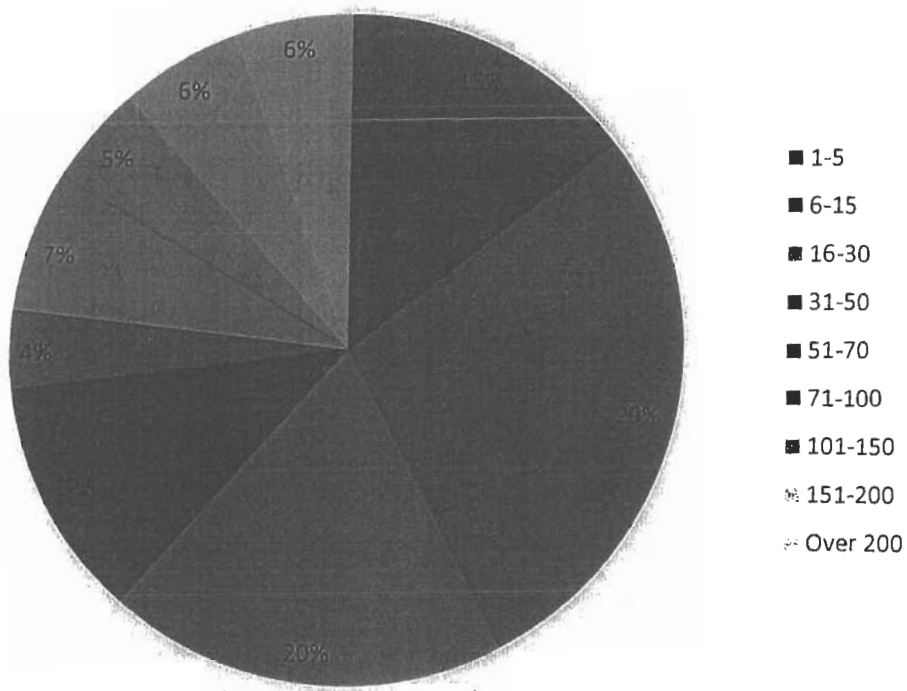
### Accredited Museum Governance



Number of FT Staff	Percent
1-5	15%
6-15	29%
16-30	20%
31-50	12%
51-70	4%
71-100	7%
101-150	5%
151-200	6%
Over 200	6%

Source: AAM

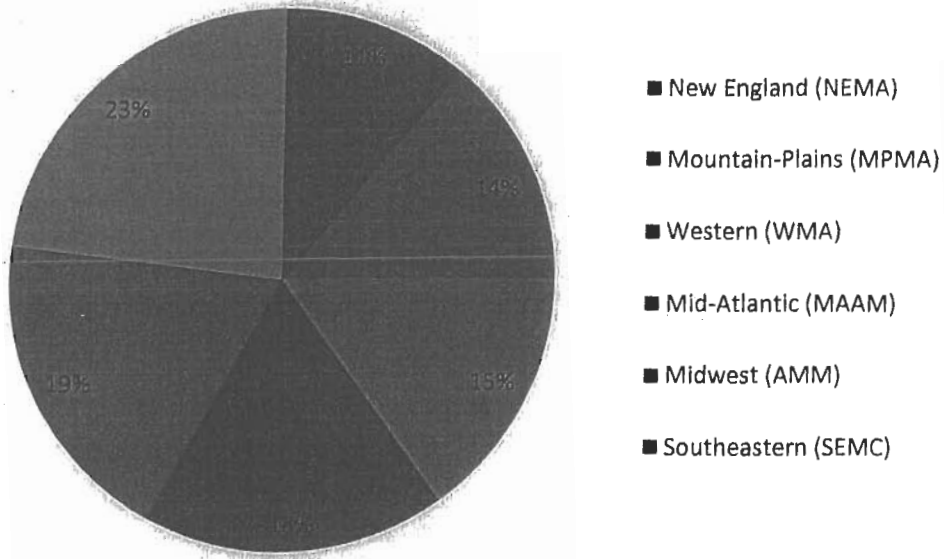
### Accredited Museum Staff Numbers



Region (Museum Association)	Percent
New England (NEMA)	11%
Mountain-Plains (MPMA)	14%
Western (WMA)	15%
Mid-Atlantic (MAAM)	18%
Midwest (AMM)	19%
Southeastern (SEMC)	23%

Source: AAM

### Accredited Museums by Region





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