



National Preservation Institute

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Historic Site Survey: *Survey Instrument*

A NATIONAL SURVEY OF THE CURRENT STATE AND NEEDS OF HISTORIC SITES

Purpose of the Survey

The National Preservation Institute (NPI), with funding from the Institute of Museum and Library Services' Professional Leadership Grant, has developed a pilot project to conduct a nationwide survey of historic sites. The purpose is to gain a more complete picture of their current status, including the type, condition, and extent of their governance, administration, and historical resources, and the most critical issues they face today. This information will form a database for the use of historic site professionals and the organizations that serve them.

Confidentiality

NPI will keep all responses entirely confidential. No individual responses will be published or distributed to organizations or individuals.

Completing the Survey

Please complete the questionnaire for your particular organization. If you have a parent organization you should complete the survey for your own organization. While certain questions may not be applicable to your particular institution, please answer all of the questions to the best of your ability. If you are not certain of exact numbers, please estimate as closely as you can.

A glossary of terms is provided for your assistance. Terms, as defined in the glossary, are for the purposes of this survey only.

If you have questions, please contact [REDACTED] or [REDACTED].

Returning the Survey

Thank you for your time. Your answers will provide important information that can help us all to improve our stewardship of historic sites. The results of this national survey will be posted on the NPI web site: www.npi.org and distributed in other appropriate forms.

Please return the completed form to: National Historic Site Survey, c/o [REDACTED]. If you wish to receive an electronic survey please email [REDACTED].

Office only: ID# _____ Date _____

NATIONAL HISTORIC SITE SURVEY QUESTIONNAIRE

Name of Institution _____

Street Address _____

Mailing Address _____

Website _____ Email _____

Contact (Name and Position) _____ Telephone Number _____

Description of Site (see attached glossary of terms)

1.1 Which of the following is included in your site? (Mark all that apply. Indicate number of items when specified.)

- | | |
|---|---|
| <input type="checkbox"/> Building(s): historic [____ buildings] | <input type="checkbox"/> Archeological excavation(s) |
| <input type="checkbox"/> Building(s): non-historic [____ buildings] | <input type="checkbox"/> Arboretum |
| <input type="checkbox"/> Collections [____ objects] | <input type="checkbox"/> Live animals |
| <input type="checkbox"/> Library [_____ volumes] | <input type="checkbox"/> Visitor Center/orientation space |
| <input type="checkbox"/> Archive [_____ linear feet] | <input type="checkbox"/> Meeting/lecture space |
| <input type="checkbox"/> Conservation lab/space | <input type="checkbox"/> Retail sales |
| <input type="checkbox"/> Landscape: historic | <input type="checkbox"/> Dedicated collections storage area |
| <input type="checkbox"/> Landscape: non-historic | <input type="checkbox"/> Food services |
| <input type="checkbox"/> Greenhouse | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Facility rental space | |

1.2 Please select the ONE category that best describes the primary function or service of your institution. (Mark one response.)

- | | |
|---|---|
| <input type="checkbox"/> Arboretum/Botanic Garden | <input type="checkbox"/> History Museum |
| <input type="checkbox"/> Art/Decorative Arts Museum | <input type="checkbox"/> Living History or Outdoor Museum |
| <input type="checkbox"/> Historic House | <input type="checkbox"/> Library/Archive |
| <input type="checkbox"/> Historic Site | <input type="checkbox"/> Other _____ |

1.3 What is your total site area including land?

- | | |
|--|---|
| <input type="checkbox"/> Less than 5,000 square feet | <input type="checkbox"/> 6 acres – 10 acres |
| <input type="checkbox"/> 5,000 – 10,000 square feet | <input type="checkbox"/> More than 10 acres |
| <input type="checkbox"/> 1 acre – 5 acres | |

1.4 What type of area is your site located in?

- Urban Suburban Rural

1.5 Is your site listed on the National Register of Historic Places? Yes No

1.6 Is your site listed as a National Landmark? Yes No

Audience

2.1 In what year did your institution first open regularly to the public? _____

2.2 Is your site open year-round or seasonally?

- Open year-round Open seasonally

2.3 How many hours per week (in season, if applicable) is your site open to the public?

- Less than 20 hours per week More than 40 hours per week
 20 – 40 hours per week Scheduled tours only

2.4 What is your annual visitation (including tours and special events)?

- Less than 5,000 25,000 – 49,999 100,000 – 199,999
 5,000 – 14,999 50,000 – 74,999 200,000+
 15,000 – 24,999 75,000 – 99,999

2.5 What approximate percentage of your visitation is school groups? _____%

Governance

3.1 Are you governed by a parent organization? Yes No

3.2 Name of parent organization/institution _____

3.3 Governing authority of your institution or your parent organization. (Select one.)

- Municipal government Federal government College, university or academic entity
 County/regional Tribal government Corporate
 State government Private nonprofit Other _____

3.4 Do you have a Mission Statement? Yes No

3.5 Has your governing authority approved your Mission Statement? Yes No

3.6 When was it last reviewed and approved?

- Within the last 2 years 2-5 years ago 5-10 years ago More than 10 years ago

Resources: Budget and Staff

4.1 Indicate the TOTAL number of paid staff at your institution. (Include part-time staff in proportion: e.g., staff who work ½ time = 0.5 staff. Round up for the total.)

- 0 1-3 4-9 10-15 16-30 31-50 Over 50

4.2 Indicate the TOTAL number of unpaid staff at your institution (regardless of full-time or part-time status) including interns, volunteers, and docents.

- 0 1-10 11-25 26-50 Over 50

4.3 Indicate the areas in which paid and unpaid staff at your institution work and the number of staff in each position (in proportion, if applicable).

- | | |
|--|---|
| <input type="checkbox"/> Administration _____ | <input type="checkbox"/> Housekeeping _____ |
| <input type="checkbox"/> Education and programs _____ | <input type="checkbox"/> Building maintenance/management _____ |
| <input type="checkbox"/> Visitor services _____ | <input type="checkbox"/> Landscape maintenance/management _____ |
| <input type="checkbox"/> Facility rentals _____ | <input type="checkbox"/> Security _____ |
| <input type="checkbox"/> Development/fundraising _____ | <input type="checkbox"/> Public affairs _____ |
| <input type="checkbox"/> Collections management _____ | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Collections care/conservation _____ | |

4.4 What is your current fiscal year operating budget?

- | | |
|--|--|
| <input type="checkbox"/> Under \$50,000 | <input type="checkbox"/> \$500,000 – \$1 million |
| <input type="checkbox"/> \$50,000 – 99,999 | <input type="checkbox"/> \$1 million – \$3 million |
| <input type="checkbox"/> \$100,000 – 249,999 | <input type="checkbox"/> \$3 million – \$5 million |
| <input type="checkbox"/> \$250,000 – 499,999 | <input type="checkbox"/> Over \$5 million |

4.5 What are the income sources of your institution's funds? (Mark all that apply.) Please estimate the approximate percentage of your total budget that comes from each.

- | | |
|--|--|
| <input type="checkbox"/> Local government _____% | <input type="checkbox"/> Individual donations _____% |
| <input type="checkbox"/> State government _____% | <input type="checkbox"/> Grants _____% |
| <input type="checkbox"/> Federal government _____% | <input type="checkbox"/> Foundations _____% |
| <input type="checkbox"/> Endowment _____% | <input type="checkbox"/> Corporate donations _____% |
| <input type="checkbox"/> Admissions _____% | <input type="checkbox"/> Gift shop sales _____% |
| <input type="checkbox"/> Membership or "Friends" groups _____% | <input type="checkbox"/> Facility rentals _____% |
| <input type="checkbox"/> Programs and special events _____% | <input type="checkbox"/> Other (specify) _____ % |

4.6 Indicate the percentage of your institution's operating budget devoted to each of the following:

- | | |
|---|---|
| <input type="checkbox"/> Staff: salary and benefits _____% | <input type="checkbox"/> Land care and management _____% |
| <input type="checkbox"/> Professional training _____% | <input type="checkbox"/> Building/facility maintenance _____% |
| <input type="checkbox"/> Marketing _____% | <input type="checkbox"/> Education/interpretive programs _____% |
| <input type="checkbox"/> Collections management and conservation _____% | <input type="checkbox"/> Special programs/exhibitions _____% |
| <input type="checkbox"/> Development/fundraising/membership _____% | <input type="checkbox"/> Other (specify) _____ % |

Buildings

5.1 Overall, what is the state of your primary historic building(s)? (Mark one response.)

- Deteriorating Static Improving Not applicable

5.2 What is the approximate combined square footage of historic buildings at your site?

- | | |
|--|--|
| <input type="checkbox"/> Under 5,001 square feet | <input type="checkbox"/> 50,001 – 100,000 square feet |
| <input type="checkbox"/> 5,001 – 25,000 square feet | <input type="checkbox"/> 100,001 – 200,000 square feet |
| <input type="checkbox"/> 25,001 – 50,000 square feet | <input type="checkbox"/> over 200,001 square feet |

5.3 Does your site have a Buildings Management Policy? Yes No

5.4 Does your site have a Cyclical Maintenance Plan? Yes No

5.5 Do you have a disaster preparedness or other emergency plan? Yes No

Environment

6.1 For each area at your site (left column) please indicate if your facility includes equipment that allows you to control the environment.

Collections storage	<input type="checkbox"/> Temperature	<input type="checkbox"/> Relative Humidity	<input type="checkbox"/> Light
Exhibit gallery	<input type="checkbox"/> Temperature	<input type="checkbox"/> Relative Humidity	<input type="checkbox"/> Light
Period rooms	<input type="checkbox"/> Temperature	<input type="checkbox"/> Relative Humidity	<input type="checkbox"/> Light

6.2 Which of the following environmental factors are monitored on a regular basis? (Mark one response for each item.)

Temperature	<input type="checkbox"/> Monitored	<input type="checkbox"/> Monitored & records kept	<input type="checkbox"/> Neither
Relative humidity	<input type="checkbox"/> Monitored	<input type="checkbox"/> Monitored & records kept	<input type="checkbox"/> Neither
Visible light	<input type="checkbox"/> Monitored	<input type="checkbox"/> Monitored & records kept	<input type="checkbox"/> Neither
UV radiation	<input type="checkbox"/> Monitored	<input type="checkbox"/> Monitored & records kept	<input type="checkbox"/> Neither
Pollutants	<input type="checkbox"/> Monitored	<input type="checkbox"/> Monitored & records kept	<input type="checkbox"/> Neither
Pests	<input type="checkbox"/> Monitored	<input type="checkbox"/> Monitored & records kept	<input type="checkbox"/> Neither

Collections

7.1 Does your institution have a permanent collection? Yes No (If No, skip to question 7.5.)

7.2 What is the total number in the collection? _____ Was this number counted estimated

7.2a Overall, what is the state of your collections? (Mark one response.)

Deteriorating Static Improving

7.3 Overall, what is the state of your archives? (Mark one response.)

Deteriorating Static Improving

7.4 What percentage of the collection is accessioned? _____%

7.5 Does your institution borrow objects? Yes No

7.6 Do you have a Collections Management Policy? Yes No

7.6a If yes, does it include preservation and conservation policies? Yes No

7.7 Have you completed a collection condition survey? Yes No

7.8 Do you have a conservation plan? Yes No

Cultural Landscape

- 8.1 Does your site have historic landscape features and/or plant materials? Yes No (If No, skip to 9.1.)
- 8.2 Does your site have a Landscape Management Policy? Yes No
- 8.3 Does your site have a Landscape Maintenance Plan? Yes No
- 8.4 Overall, what is state of the historic landscape? (Mark one response.)
 Deteriorating Static Improving

Education and Programs

- 9.1 Which of the following does your institution offer? (Mark all that apply.)
- | | |
|---|--|
| <input type="checkbox"/> Period rooms | <input type="checkbox"/> Outreach school/community programs |
| <input type="checkbox"/> Permanent exhibit(s)/exhibition(s) | <input type="checkbox"/> Website |
| <input type="checkbox"/> Temporary exhibit(s)/exhibition(s) | <input type="checkbox"/> Annual events/festivals |
| <input type="checkbox"/> Guided tours for adult visitors | <input type="checkbox"/> Special events (lectures, concerts, movies) |
| <input type="checkbox"/> Self-guided tours | <input type="checkbox"/> Family guide/children's guide |
| <input type="checkbox"/> Audio tours | <input type="checkbox"/> Materials/programs for hearing or vision impaired |
| <input type="checkbox"/> Living history interpretation | <input type="checkbox"/> Visitor transportation on site (e.g., bus, train) |
| <input type="checkbox"/> On-site programs for schools | <input type="checkbox"/> Other _____ |
- 9.2 Does your institution have an Interpretive Plan? Yes No
- 9.3 Does your institution have a Furnishing Plan? Yes No

Critical issues

- 10.1 Within the past three years has your institution experienced any of the following? (Mark all that apply.)
- | | |
|---|--|
| <input type="checkbox"/> Change of executive director | <input type="checkbox"/> New building/major restoration |
| <input type="checkbox"/> Increase in operating budget of over 25% | <input type="checkbox"/> Organizational restructuring |
| <input type="checkbox"/> Decrease in operating budget of over 25% | <input type="checkbox"/> Increase in collections of over 25% |
| <input type="checkbox"/> Change of mission/purpose | <input type="checkbox"/> Decrease in collections of over 25% |
| <input type="checkbox"/> Increase in paid staff of over 10% | <input type="checkbox"/> Major change in site's interpretation |
| <input type="checkbox"/> Decrease in paid staff of over 10% | <input type="checkbox"/> Acquisition of new property |
| <input type="checkbox"/> New strategic/master plan | <input type="checkbox"/> Natural disaster |
| <input type="checkbox"/> Increase in attendance of over 10% | <input type="checkbox"/> Theft/vandalism |
| <input type="checkbox"/> Decrease in attendance of over 10% | <input type="checkbox"/> Other _____ |

10.2 Please select the THREE most critical issues at your site. (Mark three responses only.)

- | | |
|--|---|
| <input type="checkbox"/> Ineffective governing body | <input type="checkbox"/> Public awareness/community outreach |
| <input type="checkbox"/> Insufficient paid staff and/or volunteers | <input type="checkbox"/> Research |
| <input type="checkbox"/> Insufficient staff development/training | <input type="checkbox"/> Maintenance/repair of historic building(s) |
| <input type="checkbox"/> Insufficient funding | <input type="checkbox"/> Inadequate environmental controls/systems |
| <input type="checkbox"/> Inadequate space for staff | <input type="checkbox"/> Renewal/maintenance of cultural landscape |
| <input type="checkbox"/> Inadequate space for programs | <input type="checkbox"/> Collections care and documentation |
| <input type="checkbox"/> Lack of or incomplete planning | <input type="checkbox"/> Size/scope of collections do not support mission |
| <input type="checkbox"/> Site security | |

10.3 Which of the following has your institution participated in? (Mark all that apply.)

- | | |
|---|--|
| <input type="checkbox"/> Institutional MAP (I) | <input type="checkbox"/> Conservation Assessment Program (CAP) |
| <input type="checkbox"/> Collections MAP (II) | <input type="checkbox"/> Cultural Landscape Report (CLR) |
| <input type="checkbox"/> Public Dimension MAP (III) | <input type="checkbox"/> Historic Structures Report (HSR) |
| <input type="checkbox"/> Governance MAP (IV) | <input type="checkbox"/> Historic Property Report (HPR) |
| <input type="checkbox"/> AAM Accreditation | <input type="checkbox"/> Conservation Project Support (IMLS) |

Please return the completed form to: [REDACTED]

[REDACTED]. This project is made possible by a grant from the Institute of Museum and Library Services, a federal agency that fosters innovation, leadership, and a lifetime of learning.

Glossary of Terms

The following definitions have been developed specifically for this survey. They are listed in the order of their appearance on the survey instrument and are identified below by their respective question numbers.

1.1 Library: Historical rather than research collection

Landscape, historic: Landscapes associated with an historic site, person, structure, or exhibiting other cultural or aesthetic values. These fall into four categories: historic sites; historic designed landscapes; historic vernacular landscapes; and ethnographic landscapes

Landscape, non-historic: Landscapes having no direct relationship to the documented history of a site or area

1.2 Historic Site: A government (federal, state, or local) designated historic site

3.4 Mission Statement: A statement that succinctly explains the museum's purpose and which provides benchmarks for institutional planning and decisionmaking at all levels

5.1 Deteriorating: General condition indicates some damage and/or active deterioration

Static: General condition is stable with little or no change

Improving: General condition demonstrates positive change

5.3 Buildings Management Policy: Written standards and practices for the documentation, preservation, conservation, and management of the historic buildings

5.4 Cyclical Maintenance Plan: Written plan that prioritizes and sets a schedule for regular and ongoing maintenance of the historic buildings

7.2a & 7.3 Deteriorating, Static, Improving (see 5.1 above)

7.4 Accessioned: The permanent record utilizing a control number for an object or group of objects that are added to the collection from the same source at the same time, for which the museum has custody, right or title

7.6 Collections Management Policy: Written statement stating the museum's purpose and goals and an explanation of how these are interpreted within the context of the management of the collections; this may include standards and practices for documentation, preservation, conservation, accessioning, deaccessioning, acquisition, use, access, and security

7.8 Conservation Plan: Document describing a course of action and timeline for addressing the overall conservation needs of the collection

8.2 Landscape Management Policy: Written standards and practices for the documentation, preservation, conservation, and management of the historic landscape

8.3 Landscape Maintenance Plan: Written plan that prioritizes and sets a schedule for the regular and ongoing maintenance of the landscape

8.4 Deteriorating, Static, Improving (see 5.1 above)

9.2 Interpretive Plan: Written statement describing the historical significance, interpretive focus and themes, and educational vehicles—all of which will be used to share the information with visitors and others

9.3 Furnishing Plan: One element of an interpretive plan—a written statement that brings together historical documentation, research, and physical descriptions of specific spaces and sets out a plan for restoration and interpretation

10.3 Cultural Landscape Report: Written documentation on the historic landscape, to include its design and construction history and present condition, to be used for restoration, preservation, conservation, and/or interpretation

Historic Structures Report: Written documentation on the historic buildings, to include their design and construction history and present condition, to be used for restoration, preservation, conservation, and/or interpretation