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 lenipreston@erols.com or bbbalex@aol.com.

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 [Insert Name]. If you wish to receive an electronic survey please email [Insert Email].
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.)

☐ Building(s): historic [_____ buildings]  ☐ Archeological excavation(s)
☐ Building(s): non-historic [_____ buildings]  ☐ Arboretum
☐ Collections [_____ objects]  ☐ Live animals
☐ Library [_______ volumes]  ☐ Visitor Center/orientation space
☐ Archive [________ linear feet]  ☐ Meeting/lecture space
☐ Conservation lab/space  ☐ Retail sales
☐ Landscape: historic  ☐ Dedicated collections storage area
☐ Landscape: non-historic  ☐ Food services
☐ Greenhouse  ☐ Other _____________
☐ Facility rental space

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

☐ Arboretum/Botanic Garden  ☐ History Museum
☐ Art/Decorative Arts Museum  ☐ Living History or Outdoor Museum
☐ Historic House  ☐ Library/Archive
☐ Historic Site  ☐ Other ______________

1.3 What is your total site area including land?

☐ Less than 5,000 square feet  ☐ 6 acres – 10 acres
☐ 5,000 – 10,000 square feet  ☐ More than 10 acres
☐ 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
- County/regional
- State government
- Federal government
- Tribal government
- Private nonprofit
- College, university or academic entity
- Corporate
- 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).

☐ Administration ______
☐ Education and programs ______
☐ Visitor services ______
☐ Facility rentals ______
☐ Development/fundraising ______
☐ Collections management ______
☐ Collections care/conservation ______

☐ Housekeeping ______
☐ Building maintenance/management ______
☐ Landscape maintenance/management ______
☐ Security ______
☐ Public affairs ______
☐ Other ______

4.4 What is your current fiscal year operating budget?

☐ Under $50,000
☐ $50,000 – 99,999
☐ $100,000 – 249,999
☐ $250,000 – 499,999
☐ $500,000 – $1 million
☐ $1 million – $3 million
☐ $3 million – $5 million
☐ 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.

☐ Local government _____
☐ State government _____
☐ Federal government _____
☐ Endowment _____
☐ Admissions _____
☐ Membership or “Friends” groups _____
☐ Programs and special events _____
☐ Other (specify) ___________________ _____

☐ Individual donations _____
☐ Grants _____
☐ Foundations _____
☐ Corporate donations _____
☐ Gift shop sales _____
☐ Facility rentals _____
☐ Other (specify) ___________________ _____

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

☐ Staff: salary and benefits _____
☐ Professional training _____
☐ Marketing _____
☐ Collections management and conservation _____
☐ Development/fundraising/membership _____
☐ Land care and management _____
☐ Building/facility maintenance _____
☐ Education/interpretive programs _____
☐ Special programs/exhibitions _____
☐ 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?

☐ Under 5,001 square feet
☐ 5,001 – 25,000 square feet
☐ 25,001 – 50,000 square feet
☐ 50,001 – 100,000 square feet
☐ 100,001 – 200,000 square feet
☐ 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.

<table>
<thead>
<tr>
<th>Area</th>
<th>Temperature</th>
<th>Relative Humidity</th>
<th>Light</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collections storage</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Exhibit gallery</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Period rooms</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Factor</th>
<th>Monitored</th>
<th>Monitored &amp; records kept</th>
<th>Neither</th>
</tr>
</thead>
<tbody>
<tr>
<td>Temperature</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Relative humidity</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Visible light</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>UV radiation</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Pollutants</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Pests</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

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.)
☐ Period rooms ☐ Outreach school/community programs
☐ Permanent exhibit(s)/exhibition(s) ☐ Website
☐ Temporary exhibit(s)/exhibition(s) ☐ Annual events/festivals
☐ Guided tours for adult visitors ☐ Special events (lectures, concerts, movies)
☐ Self-guided tours ☐ Family guide/children’s guide
☐ Audio tours ☐ Materials/programs for hearing or vision impaired
☐ Living history interpretation ☐ Visitor transportation on site (e.g., bus, train)
☐ On-site programs for schools ☐ 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.)
☐ Change of executive director ☐ New building/major restoration
☐ Increase in operating budget of over 25% ☐ Organizational restructuring
☐ Decrease in operating budget of over 25% ☐ Increase in collections of over 25%
☐ Change of mission/purpose ☐ Decrease in collections of over 25%
☐ Increase in paid staff of over 10% ☐ Major change in site’s interpretation
☐ Decrease in paid staff of over 10% ☐ Acquisition of new property
☐ New strategic/master plan ☐ Natural disaster
☐ Increase in attendance of over 10% ☐ Theft/vandalism
☐ Decrease in attendance of over 10% ☐ Other _________________________________
10.2 Please select the THREE most critical issues at your site. (Mark three responses only.)

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

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

☐ Institutional MAP (I)  ☐ Conservation Assessment Program (CAP)
☐ Collections MAP (II)  ☐ Cultural Landscape Report (CLR)
☐ Public Dimension MAP (III)  ☐ Historic Structures Report (HSR)
☐ Governance MAP (IV)  ☐ Historic Property Report (HPR)
☐ AAM Accreditation  ☐ Conservation Project Support (IMLS)

Please return the completed form to: National Historic Site Survey, c/o Barbara B. Ballentine, 732 South Royal Street, Alexandria, VA  22314. 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