



National Preservation Institute

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Historic Site Survey: *Background and Methodology*

Background

There is concern on the part of those both within and outside the historic site profession of the increasingly unstable future faced by many historic sites. Evidence of this can be seen in sessions at museum association meetings and in related articles in professional journals and in media sources such as *The New York Times*. James Vaughan, vice president for Stewardship of Historic Sites of the National Trust for Historic Preservation, stated, “In the increasing competition for visitors, members, and financial support, many, if not most, historic sites are struggling for survival...” Although there is this widespread concern within the profession, there is little hard data on the current condition of historic sites and what is required to improve their situation. The conferees at the conference, “Rethinking the Historic House Museum for the 21st Century,” sponsored by AASLH and the National Trust at the Pocantico Conference Center in April 2002 recognized this same need to “begin research on the current status of house museums and historic sites.”

The National Preservation Institute (NPI), as part of its ongoing effort to serve the cultural resource management field, undertook a pilot project to develop and test a survey that would gather information both on the current condition and most critical issues facing historic properties today. A compilation of the survey findings was then seen as one tool for addressing stewardship issues at sites nationwide.

The Historic Site Survey was a direct outgrowth of NPI’s seminar, *Holistic Stewardship of the Historic Site*, which was developed for the purpose of improving cultural resource management practices through the presentation of an holistic model with a grant from the Institute of Library and Museum Services (IMLS). The seminar is based on three principals:

- All stewardship decisions and actions are based upon an ongoing **interdisciplinary planning and management** process.
- Historic sites are composed of **overlapping areas of stewardship**, which can be thought of as a series of concentric circles at the center of which is the organization’s mission. Surrounding this are the contents (collections); container (buildings); context (landscape); and community (including governing body, members or friends groups, the public, and scholars, etc.). Each of these exists, not in a vacuum, but as part of an integrated whole.
- The mission statement is predicated upon thorough and honest research and analysis and it serves as the basis for an **integrated decisionmaking process**.

Objectives

NPI developed the Historic Site Survey to collect accurate and timely information on the current condition and the most critical issues effecting the stewardship and preservation of historic sites. The results of the survey will help to:

- Establish stewardship standards and practices;
- Identify appropriate funding areas and levels;
- Identify training needs; and
- Provide accurate information that can be used to promote the effective preservation and interpretation of our historic resources for the public benefit.

The purpose of this pilot phase of the Historic Site Survey project was to design a survey instrument, create a database, and collect and interpret the data from an initial group of respondents, all of which could serve as the model for a nationwide data collection process.

Methodology

During the project's development phase, a meeting was held in February 2002 to discuss its design, purpose, and anticipated outcomes. Attendees included: representatives from the American Association of Museums; the American Association for State and Local History and the National Trust for Historic Preservation, who were cosponsors of the Pocantico conference; Heritage Preservation; IMLS and NPI staff; as well as an associate from Randi Korn & Associates, who designed the survey instrument.

The survey instrument was submitted in draft form to a number of professionals, who provided suggestions for improvements. Forty-one historic sites participated in the project. Of the completed surveys, 16 respondents attended the National Preservation Institute's seminar, *Holistic Stewardship of the Historic Site* (June 2001 or June 2002) and completed the surveys in June 2002. Twenty-five additional sites, all of which are members of the Southeastern Museum Conference's Historic House Museum Affinity Group (HHMAG), completed the surveys in the winter of 2002-2003. NPI is extremely grateful to the HHMAG chairs for their cooperation.

Who Will Benefit From the Survey Results?

The public would benefit directly from improved preservation and educational initiatives at historic sites, as those organizations implement revised practices based upon the information available on sites nationwide.

The **profession at large** would benefit through:

- Access to data on the size and condition of historic sites' resources (human, financial, and physical) on a local, regional, and national basis, which can then be used for planning at all levels, communications, and the education of decisionmakers at the local, state, regional, and national level;
- A dialogue on national stewardship standards and practices based upon the collected data; and
- The development of training programs that responds directly to identified needs.

The **governing bodies and staff** of historic sites benefit through:

- The ability to assess their performance and operations and compare these to other organizations with similar missions, as they relate to their physical, financial, and human resources and their public programming;
- Established accountability standards based upon the above; and
- The collection of data that can better inform their constituencies, audiences, stakeholders and funders, thereby increasing support of all kinds for the institutions.

Funders from both the public and private sectors benefit through:

- Hard data that can help to clarify and/or define their own, individual objectives;
- The allocation of their financial resources in a way that meets their mission while ensuring the greatest impact on their own communities; and
- A process for establishing accountability standards.

Service providers benefit through the compilation of data on which they can determine:

- The types of programs, and the levels of expertise required, for such programs, that can best respond to the needs of the profession; and
- Appropriate locations for programs that will provide low-cost attendance for the greatest number of participants.

The Survey's Future

The quality and content of the data gathered through this project provides the type of information and documentation that was called for by the Pocantico Conferees. At the same time, it can provide some context to the data being gathered through Heritage Preservation's Heritage Health Index project, which is also funded by IMLS.

It is not within the scope of the IMLS grant to develop the Historic Site Survey project further. Therefore, the project team will continue its efforts to identify another organization that will undertake to continue this effort on a nationwide basis. The survey, if reflective of a larger historic site base, could have a substantive and lasting effect upon the ability of the stewards of our historic sites to sustain their organizations. At the same time, it would provide professional organizations with the information they need to better serve their constituents.