



National Preservation Institute

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Historic Site Survey: *Holistic Stewardship of the Historic Site*

Background

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**.

Seminar Overview

Explore a new methodology and holistic approach to the stewardship of historic sites. With the goal of ensuring the stability and sustainability of historic sites, the seminar will examine the often competing needs of the buildings, landscape, and collections; the role of archaeology, interpretation, and site use; and visitor needs. Participants will learn to assess the institutional mission and its role in management; establish professional standards and practices for successful stewardship; and define a constructive institutional decision-making process for developing realistic and comprehensive long-range strategies. The seminar includes lectures, case studies, and field trips to historic sites.

Targeted Participants

Mid-level professionals who are historic site administrators from museums, historical societies, libraries, etc.; curators; and collections and facilities managers. The seminar is particularly relevant for board members and administrators coming from other disciplines.

Faculty

Charles A. Birnbaum, FASLA, coordinator, National Park Service Historic Landscape Initiative; formerly in private practice; editor of *Preserving Modern Landscape Architecture* and *Pioneers of American Landscape Design*.

William Lebovich, architectural historian and photographer; AAM accessibility awards juror; author of *Design for Dignity, America's City Halls*; and chapter on archival, large-format photography for *Recording Historic Structures*.

Alfonso A. Narvaez, senior project manager and architectural conservator with the Preservation Technology Group at John Milner Associates, Inc.; worked on more than 100 historic properties; formerly with the National Park Service

Leni Preston, coordinator, *Holistic Stewardship of the Historic Site* seminar; principal, Preston and Associates, consultants to historic sites, museums, and historical organizations, specializing in institutional and strategic planning; formerly at Monticello and Tudor Place Historic House Museum and Garden.

Brian Ramer, conservation consultant, specializing in collection and facility assessments, environmental surveys, climate and lighting control in historic buildings, and long-range conservation planning.

Evaluation Comments

The following comments came from evaluations completed by participants at the end of the June 2001 and June 2002 seminars:

"This was an excellent program that I think everyone managing an historic site should attend. It is well rounded, detailed, and very effective. The instructors were all great—very professional, very knowledgeable, and very enthusiastic. A program that is thought provoking!"

What did you least like—"That it's over"—"I would like the program longer!"—"That it had to end!"

"This seminar has prepared me to look at the total picture in making professional decisions or actions."

"The program is fantastic and although the schedule is hectic, I can't think of anything I would subtract."

"The opportunity to do this residentially was beneficial."

"I really believe that this seminar should be repeated exclusively for executive directors and their boards . . . Although I had the schedule in advance, I could not have imagined the depth, breadth and wealth of information presented by the instructors and my fellow participants."

"The lectures were all very clearly presented in a way that allowed me to develop a plan of action to undertake upon returning to my historic site."

"I liked the fact that it encourages a holistic view of managing historic sites and that this should be enforced by a vision, mission, and strategic plan."

Agenda

Day One

- Arrival of participants (afternoon)
- Introductory “Getting to Know You” session
- Reception

Day Two

- Keynote address
- The Seminar: What to expect
- Holistic Stewardship: What is it?
- Governance/Administration
- Management Policies
- Vision/Mission
- Reception

Day Three

- Historic Buildings: An holistic approach to their preservation, interpretation, and use
 - The building as a container for the collections
 - Documentation
 - Management and maintenance plans
- Historic Landscapes: An holistic approach to preservation, planning, and interpretation
 - Documentation
 - Management and maintenance plans
- Case study site visit

Day Four

- Landscape Preservation: Mini case studies
- Historical Archaeology
- Integrated Interpretive Planning
- Case study site visit

Day Five

- Collections: An holistic approach to their care, conservation, and use
 - Environmental issues
 - Care and conservation
 - Storage and exhibition
- Case study site visit
- Reception

Day Six

- Strategic Planning: A design for success
- Solving the Problems: A case study
- Participants will put what they have learned to work, followed by instructors’ panel
- Closing remarks (mid-afternoon)