

New Solutions for House Museums

All photos: Donna Ann Harris



Left: The Emily Carr House, located in Victoria, BC, was devolved from government ownership to a private individual with experience in historic site management as part of a license agreement for fifteen years. The site is open for tours on a seasonal basis.



Left: The Point Ellice House, in Victoria, BC, has been licensed for fifteen years to the Capital Mental Health Association and is open for seasonal public visitation. The Mental Health Association also uses part of the grounds for a tea salon where the agency's clients gain experience in food service.



Right: Casa Amesti, in Monterrey, CA, is now managed by the Casa Amesti Foundation under an agreement with the National Trust.

Editor's Note: This article incorporates material from *New Solutions for House Museums: Ensuring the Long-Term Preservation of America's Historic Houses* (Lanham, MD: AltaMira Press, 2007). The book is available for order from www.altamirapress.com.

BY DONNA ANN HARRIS

In the early years of the preservation movement, as Richard Moe, president of the National Trust for Historic Preservation so aptly stated in his 2002 article, "Are There too Many House Museums?," the words "historic preservation" and "house museum" were virtually synonymous. While the preservation movement has broadened and deepened its scope, saving historic houses and turning them into house museums is still the most common paradigm. Indeed, it is remarkable that so little has changed since Ann Pamela Cunningham and her intrepid band of ladies saved Mount Vernon for conversion into a museum more than 150 years ago. Today, no one knows exactly how many house museums there are in America. The last count, taken from the *Directory of Historic House Museums* lists 8,000 house museums, but has not been updated since 1999. There has been considerable concern in the professional history community about the large number of house museums, especially because so many are not sustainable.¹

For example, Philadelphia, Pennsylvania, has an embarrassment of riches. In the five-county Philadelphia region, there are 275 historic sites, at least 200 of them house museums. Forty percent do not have professional staff, and more than half have budgets of less than \$100,000. Of these, less than ten percent have any endowment whatsoever. The cost to maintain the site, let alone restore it, may be beyond the reach of the organization. Board members and volunteers are retiring and few young people are stepping forward to take their place. These concerns face house museums nationwide. What will happen to these houses when volunteers can no longer serve on boards or take care of buildings? Many house museum organizations now struggling with these issues found the December 2006 announcement by Colonial Williamsburg to put Carter's Grove, a plantation house, on the market for sale to a private individual with easements, was a potent symbol of change.²

In my recent book published by AltaMira Press, *New Solutions for House Museums*, I describe eight successful solutions that historic house museum organizations have pioneered to find a new owner or user for their site. Unlike Colonial Williamsburg, many historic house museum boards of directors may not have the option to sell their property due to legal restrictions from the purchase/donation of building, the collection, or because of donor restrictions on the endowment (if one even exists). Local public sentiment may also prevent use as anything other than a house museum. There are several alternatives available to historic site owners if they conclude they can no longer manage their site, but a house museum use must remain. Two of five

solutions profiled in the book are presented here along with condensed case studies to illustrate the solution.

Option 1. Lease to Another Entity as a House Museum

For this alternative, a house museum organization would retain ownership of the property but actively seek a tenant who will manage the historic site as a house museum. The historic site would remain open for public visitation as described in the lease agreement.

Like all other solutions mentioned in *New Solutions for House Museums*, the physical condition of the property will drive any potential use as well as the classic rule of real estate—location, location, location. Incentives may have to be offered to potential house museum operators, particularly if the property is in poor condition or if major restoration and rehabilitation work must be undertaken before offering the site for lease. This solution would be a good option for properties that have particularly significant interior and exterior features that should not be compromised, as the tenant will be responsible for maintaining them. The house museum owner may have to offer the property for a nominal rent or even for free to induce a tenant to take over all the maintenance, capital, and operating costs for a house museum use. The lease term may have to be considerable if substantial capital repairs are needed. Additionally, site owners must provide a tenant with specific performance measures to assure that the conservation values, collections, and historic fabric are well treated during the lease term while the owner monitors the site regularly.

A formal Request for Proposals (RFP) process can assist the house museum board in making choices among potential bidders. The board may need assistance to prepare a quality RFP document and should be advised by someone knowledgeable about the local commercial real estate and heritage tourism markets. Before preparing the solicitation, the organization must have an excellent grasp of the physical condition of the building. It is critical to know if the house

museum meets local building and fire codes. The RFP will help solicit a wide variety of tenants including for-profit organizations, individuals, or other nonprofit organizations. The house museum organization will need assistance in structuring the RFP solicitation and may have to offer incentives to gain a quality tenant. Any rental fees should be dedicated to preservation of the building first, maintenance second, and any funds remaining allocated to other aspects of the house museum organization's mission.

Persuading the board to consider leasing the property to another house museum operator, be they in the public, private, or nonprofit sector, may take a long time. The board of directors can make the decision to lease their building because it still retains control of the real estate. However, the board should consult and involve the community and other preservation partners in the area. Community involvement in decision-making to make this management change will help tremendously in preventing adverse publicity. The organization needs to make the case to the community that its ultimate objective is the preservation of the historic building and that the tenant will retain public access. Finding an appropriate tenant may take a long time, as the specialized talents needed to operate a house museum and maintain the collections while making it a viable business venture require substantial skill and financial acumen.

Case Study: British Columbia Heritage Branch Historic Sites

In 2001, faced with a new government insisting on privatization of many aspects of provincial government, the Heritage Branch of the British Columbia (Canada) Ministry of Community, Aboriginal, and Women's Services implemented the devolution or licensing of all thirty historic sites in the province to private, nonprofit, or governmental managers to operate the sites as tourist attractions and maintain them as house museums through a procurement process. The government wanted other entities to assume responsibility for the management and operation of all the historic sites owned by the province and to offer public access at least on a seasonal basis. The province's thirteen operating historic sites ranged from small homes to ranches, gold mining villages, an Indian long house, a church, and a school. The other seventeen were archaeological sites whose management would also be privatized.³

The Heritage Branch organized a three-step procurement process for the thirteen operating historic sites. They designed a Request for Expressions of Interest to "inform the market about the process to permit private and nonprofit entities to become front line operators of the historic sites with no subsidies" and develop a list of potential bidders. Anyone interested in bidding submitted their qualifications during the Request for Qualifications phase. In response, teams interested in managing historic sites included both their financial information and professional qualifications to "protect heritage values and integrity of the site and collections." Teams were rated and qualified based on their financial capacity. If accepted, the Heritage Branch invited teams to submit during the final phase, the Request for Proposals.

During the RFP phase, the team identified which site it



Donna Ann Harris, author of *New Solutions for House Museums*.

planned to bid on, took a walk-through, and received information about operating costs for each site which would be transferred to the new operator if successful. Teams that qualified during the RFQ phase submitted business plans for the operation of the site. If accepted, the team entered into formal negotiations for a fifteen-year license term with the provincial government. In the end, qualified teams submitted bids for each of the sites during the two-year devolution process.⁴

Today, a variety of entities manage the thirteen former provincial heritage sites. They include private individuals and companies, nonprofit “friends of” groups, a nonprofit mental health association, a land conservancy, a local school district, an Indian Tribal Council, and the Royal British Columbia Museum. All have stepped forward to open their respective sites for public visitation at least seasonally.⁵

Patrick Frey, who now runs the Heritage Branch and has followed the devolution process for three years, made the following observations about the successes of the program: “Several of the devolved sites have made significant progress in introducing new initiatives to increase revenue and visitation, but all of the sites have challenges to their operational sustainability that need to be addressed in the coming years if devolution is to be effective over the long term. Two of the original site managers have terminated their site management agreements and the Heritage Branch is working to negotiate alternative approaches that will ensure the continuation of community-based management of these sites.”⁶

The staff of the Heritage Branch, faced with devolving all of their historic sites to the private sector, drew on successes they had pioneered over the years to make the change required by the new government in power. Realizing that they had successes with short-term relationships using outside contractors, they decided to build upon and expand these relationships. The experience of the Heritage Branch in managing the fifteen-year licenses has been good, but not an unqualified success. Most of the licensees are struggling, but others who have responded to the financial pressures of operating a seasonal historic site have developed some creative solutions.⁷

According to Frey, “The long term success of devolution hinges not only on focused provincial investment towards the conservation of the heritage resources and providing professional advice that helps build the stewardship capacity of site managers, but also on encouraging creativity in programming and sound business practices. All of these factors will be essential elements of management sustainability for the heritage properties.”⁸

Option 2. Sale to Another Nonprofit Stewardship Organization with Easements

This option involves the house museum organization selling the real estate to another nonprofit organization that is better able to manage the site as a house museum. An existing or a new stewardship organization may be set up to take title to the building and operate the historic site as a house museum. Sale to another nonprofit may be the only acceptable alternative if the property was donated with specific restrictions on use or ownership. This kind of transaction is often a bargain sale, meaning that the new owner does not pay full market value because the intent is to preserve the property, not

realize the highest price for the sale of the asset.

The existing house museum organization dissolves after the transfer of the real estate and upon paying all remaining bills and filing legal documents for dissolution. The new stewardship organization would receive any endowment or maintenance funds from the dissolving organization to help maintain the property over time. How the property is used in the future would have to be part of the negotiation with the new stewardship organization. Sale proceeds should be donated to a community foundation or a bank trust fund created to serve as a maintenance endowment to benefit the property. Despite its sale to another nonprofit organization, it is wise for the existing stewardship organization to place an easement or conservation restriction on the property prior to its sale, so the original house museum organization can ensure that its good work will not go undone in the future. Identifying an easement-holding organization willing to accept the property is crucial to success.

The museum’s attorney should consult with the state’s attorney general prior to concluding negotiations with the new stewardship organization. This decision could take the house museum board months or years, assuming there is an existing stewardship organization or a newly created one with the resources to purchase, operate, and endow the house museum operation.

Case Study: Casa Amesti

The National Trust for Historic Preservation had owned Casa Amesti, an 1834 California adobe, since it was willed to the organization in 1953, just four years after it received its national charter. Located in Monterey, California, Francis Adler Elkins, a California-based interior



The new Casa Amesti Foundation spent almost \$1.5 million to restore the building and grounds when they took over stewardship from the National Trust for Historic Preservation.



designer, donated the house to the nascent organization without an endowment for maintenance or restoration. Mrs. Elkins's brother, David Adler, a well-known Chicago architect of homes for the well-to-do, updated the building while Mrs. Elkins created a noteworthy and timeless interior that remained substantially intact when the Trust received the property in 1953.⁹

The Washington, DC-based National Trust was not orga-

nized to administer an historic property perceived as "so far away" in California and decided to find an entity willing to maintain Casa Amesti and allow public access to the site. For a new national stewardship organization, leasing the property to another party was a radical notion, but this solution solved many problems. The Trust entered into a twenty-year occupancy agreement with the Old Capital Club, a nonprofit private social and dining club. They renewed this agreement again in 1977. Through the occupancy agreement, the Club was obligated to maintain, operate, and preserve the premises for the public benefit. The Club assumed all expenses and opened the building for tours on weekdays after 3 p.m. and on weekends after 10 a.m.¹⁰

While this arrangement worked well for more than twenty years, the Trust became increasingly uncomfortable about whether the public perceived that there was *de facto* public access available, as was required under the federal grants received by the Trust at the time. It began discussions with the Old Capital Club in the early 1980s about developing a new stewardship arrangement for the old adobe. The Club, local stakeholders, and the Elkins family had to agree on the direction for the new stewardship arrangement which took years to craft and implement. By 1995, the principles struck an agreement that required: an endowment of \$500,000 to be raised and deposited with the local community foundation; the completion of a \$1 million restoration; and the placement of façade, interior, and open space easements on the property prior to transfer. Because the Trust had received the property through Mrs. Elkins's will, the California Probate Court had to approve the transfer of the property to the newly formed Casa Amesti Foundation. Court approval and property transfer took place in late 2000, and easements were placed on the property shortly after. The perpetual easement the Trust holds and annually inspects allows the organization to continue its relationship

Conclusion

House museums are still a vital part of the preservation movement, but current stewards and grassroots activists need more models to assure that valuable historic properties can be sustained long term. This article discussed two of five

possibilities for retaining a house museum use if the restrictions on the site's acquisition, collection, or endowment require that public access and educational use be maintained. ©

¹ Richard Moe, "Are There Too Many House Museums?," *Forum Journal*, 16, no. 1 (2002): 7; Patricia Chambers Walker and Thomas Graham, compilers, *Directory of Historic House Museums in the United States*, Walnut Creek CA: AltaMira Press, 1999.

² Donna Ann Harris and Barbara Silberman, "Exploring Alternative Stewardship Arrangements for Historic Houses, joint grant proposal to the William Penn Foundation and The Pew Charitable Trusts," November 2004, 7; Tracie Rhozon, "Homes Sell, and History Goes Private," *New York Times*, 31 December 2006, 1.

³ Rhonda Hunter, interview by author, Victoria, BC, 8 November 2004. This case is a highly abridged version of case that appears in *New Solutions for House Museums*.

⁴ John Adams, interview by author, Victoria, BC, 14 September 2004.

⁵ Hunter interview.

⁶ Patrick Frey, e-mail correspondence with author, 31 August 2006 and 11 September 2006.

⁷ Ibid.

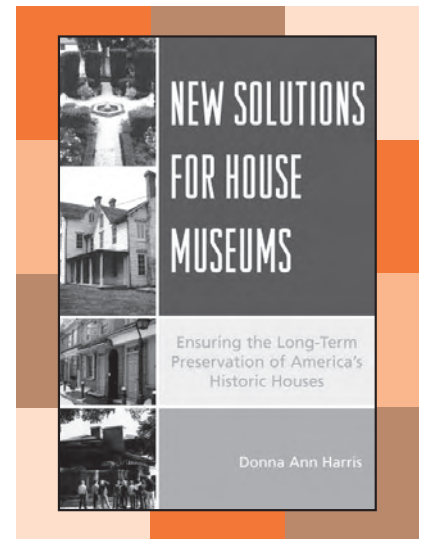
⁸ Frey, e-mail correspondence with author, 11 September 2006.

⁹ Thompson Mayes, interview by author, Washington, DC, 13 May 2003. This is a highly abridged version of the case appearing in *New Solutions for House Museums*.

¹⁰ Thompson Mayes, interview by author, Washington, DC, 6 December 2004.

¹¹ Ibid.; Mayes interview, 13 May 2003.

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