



National Preservation Institute

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Historic Site Survey: *Report and Analysis*

The survey instrument includes a variety of questions relating to general site description, governance, administration, resources, environment, collections, cultural landscape, audience, education, and critical issues. Basic frequencies in the completed surveys were tabulated and put into summary tables from which the following conclusions have been drawn to provide an overview of the survey results.

Site Demographics

Demographics of participating historic sites. Please note that not all sites responded to all questions.

- **Historic Resources:** All had historic buildings and 27 sites (69.2%) had non-historic buildings; 9% (38 sites) had permanent collections; and 70% (28 sites) had historic landscapes, and the same percent had non-historic landscapes.
- **Staff:** 17.1% (7 sites) had 3 or fewer staff (either paid or unpaid); 3 sites had no staff.
- **Operating Budget:** Budgets ranged from less than \$50,000 (7.5% or 3 sites) to over \$5 million (5% or 2 sites); 32.5% (13 sites) had budgets of between \$100,000 to \$249,999; 20% (8 sites) had budgets of \$250,000 to \$499,999.
- **Governance:** 58.5% (24 sites) are governed by private/nonprofit organizations, while another 12.2% (5 sites) are operated by a municipal government.
- **National Register/NHL Status:** 87.8% (36 sites) are listed on the National Register of Historic Places and 32.5% (13 sites) are National Historic Landmarks.
- **Opening Date:** More than half of the sites opened between 1966 and 1982.
- **Hours of Operation:** 56.4% (22 sites) are open 40 hours/week; 35.9% (14) are open 20 to 40 hours/week; 5.1% (2 sites) are open less than 20 hours/week; and one site was open for scheduled tours only.
- **AAM Accreditation:** 26.8% (11 sites) are accredited by the American Association of Museums.
- **Educational Programs:** Among the respondents, the top ten educational programs and initiatives were: *Web Site* (92.7%); *Annual Events/Festivals* (87.8%); *Special Events* (85.4%); *Guided Tours* (adults) (85.4%); *Period Rooms* (78%); *On-Site Programs for Schools* (75.6%); *Outreach School/Community Programs* (75.6%); *Temporary Exhibitions* (65.9%); *Permanent Exhibitions* (56.1%); *Self-Guided Tours* (48.8%).
- **Greatest Change Experienced at Sites:** When asked to identify the issue(s) the site had experienced over the last three years, a *change in executive director* was cited by the largest number, 37.5% (15 sites). The second issue cited was *acquisition of new property* by 9 sites or 22% of respondents.

Critical Issues

Despite the relatively small number of participants in this pilot phase, it is still possible to draw some initial conclusions from the top six issues cited in response to the question, "Please select the THREE most critical issues at your site."

- **Public awareness and community outreach** [cited by 51.2% or 21 sites]
 - The visitation numbers support this with 32.5% or 13 sites showing visitation in the 5,001 to 14,999 range and 22.5% or 9 sites in the 15,000 to 24,999 range
 - 35% of sites have no one working on public relations; at the same time, of the 65% that do, it is unclear whether these are full- or part-time staff
 - 20 sites have marketing as a line item in their budgets with most spending under 5%
 - Only 4.9% or 2 sites have completed Public Dimension Assessment (MAP III)

- **Insufficient paid staff and/or volunteers** [cited by 46.3% or 19 sites]
 - As noted above, 56% or 23 sites have between 1 and 9 paid staff (17.1% or 7 sites have 1 to 3; 39% or 16 sites have 4 to 9)
 - 61% or 25 sites have between 1 and 25 unpaid staff, including volunteers, interns, and docents; (36.6% or 15 sites have 1 to 10; 24.4% or 10 sites have 11 to 25; 2 sites had more than 50)

- **Status of historic buildings.** Participants' responses to a question regarding the condition of the sites' historic resources (buildings, collections, and landscape) provide a picture of the current status of historic sites. At the same time, they also identify areas for further professional attention.
 - Buildings:
 - Deteriorating (25% or 10 sites)
 - Static (17.5% or 7 sites)
 - Improving (57.5% or 23 sites)
 - Collections:
 - Deteriorating (13.2% or 5 sites)
 - Static (34.2% or 13 sites)
 - Improving (52.6% or 20 sites)
 - Historic Landscape
 - Deteriorating (15.2% or 5 sites)
 - Static (36.4% or 12 sites)
 - Improving (48.5% or 16 sites)

- **Maintenance/repair of historic buildings** [cited by 43.9% or 18 sites]
 - In examining this issue, it should be noted that, while 87.5% or 35 sites have collections management policies, only 30% or 12 sites have written policies for the management of their buildings and only 23.1% or 9 sites have the same for the landscape.
 - As to conservation or cyclical maintenance plans, sites responded in the affirmative for:
 - buildings at 60% or 24 sites
 - collections at 51.2% or 21 sites
 - landscape at 41% or 16 sites
 - From this data, it seems plausible to draw the conclusion that the maintenance and repair of the buildings is certainly an issue and more attention needs to be placed upon professional policies and plans for their maintenance. At the same time, the landscape requires more attention on the part of historic site stewards.
- **Insufficient funding** [cited by 41.5% or 17 sites]
 - 25 sites have operating budgets in the \$100,000 to \$1 million range; 32.5% or 13 sites at \$100,000 to \$249,999; 20% or 8 sites at \$250,000 to \$499,999; and 4 sites at \$500,000 to \$1 million)
 - 7.5% or 3 sites have budgets of less than \$50,000 and 5% or 2 sites have operating budgets of more than \$5 million
 - Certain areas of potential funding are underrepresented; only 14.5% or 8 sites receive funding from the federal government, foundations, or corporate donations
 - 39% or 16 sites have endowments; income from these represents from 1% to 98% of total income
 - 50% or 13 sites have a line item for development and fundraising; amounts budgeted range from 0.01% to 7.5% of total income with 4 sites or 15.4% showing 5%
- **Inadequate environmental controls/systems** [cited by 29.3% or 12 sites]
 - Sites were asked the following, “For each area at your site please indicate if your facility includes equipment that allows you to control the environment.” From the responses, relative humidity remains the least controlled environmental factor.

Area	Temperature	Relative Humidity	Light
Collections Storage	Yes 74.4% (29) No 25.6% (10)	Yes 53.8% (21) No 46.2% (18)	Yes 74.4% (29) No 25.6% (10)
Exhibition Galleries	Yes 56.4% (22) No 43.6% (17)	Yes 35.9% (14) No 64.1% (25)	Yes 48.7% (19) No 51.3% (20)
Period Rooms	Yes 71.8% (28) No 28.2% (11)	Yes 43.6% (17) No 56.4% (22)	Yes 66.7% (26) No 33.3% (13)

- At the same time, at least 50% of the respondents were both monitoring and maintaining records on the temperature, relative humidity, visible light, and uv radiation; 35% were doing both for pollutants and 42.5% were doing both for pests.
- **Lack of or incomplete strategic planning** [cited by 24.4% or 10 sites]. In assessing this response, it should be noted that among the first group that completed the survey all had participated in the NPI seminar, *Holistic Stewardship of the Historic Site*, which stresses the importance of planning at all levels, including the preparation of a strategic plan. Among this group, 5 of 15 respondents (33%) cited this as a critical issue placing it third in the ranking behind *Maintenance/repair of historic buildings* (10 of 15) and *Insufficient paid staff and/or volunteers* (7 of 8).

Other Concerns

Finally, there are several other issues of professional interest that arise from the survey results.

- While 41.5% (17 sites) have undertaken the Institutional Assessment (MAP I), only 24.4% (10 sites) have completed the Collections Assessment (MAP II), and a mere 4.9% (2 sites) the Public Dimension Assessment (MAP III). No sites have participated in the Governance Assessment (MAP IV).
- 51.2% (21 sites) have not completed the Conservation Assessment Program (CAP) and only 34.6% (9 sites) have received Conservation Project Support funding from IMLS.
- A lack of research, while only being cited as a critical issue by 4.9% (2 sites) of the respondents, would appear to be an issue based upon the fact that:
 - 65.9% (27 sites) have not done a Historic Structures Report
 - 92.7% (38 sites) have not done a Cultural Landscape Report
 - Only 1 site had undertaken a comprehensive Historic Property Report
 - 43.9% (18 sites) have no Interpretive Plan
 - 57.5% (23 sites) have no Furnishing Plan

Conclusions

Despite the relatively small number surveyed for this pilot project, there are some definitive conclusions that can be drawn from the findings. Were the survey to be conducted on a nationwide basis, it would clearly yield valuable information both for the stewards of historic sites, as well as those organizations that serve them. In addition, the findings could be used to propose stewardship standards and best practices. If adapted for use on a regional and local basis, these could vastly improve the practices at individual sites, thereby ensuring that the nation's historic resources are preserved for future generations and that they are serving both present and future constituent audiences. It is the hope of all those involved in this phase of the project, that it will be carried on for the benefit of the profession and the public at large.