



## Policy Responses for State owned Historic Sites

New Jersey Historic Preservation Conference  
Donna Ann Harris  
June 7, 2012

Heritage Consulting Inc.



## Funder

- Funder: Jeffris Heartland Fund of the Midwest Regional Office of the National Trust for Historic Preservation
- Client: Illinois Historic Preservation Agency

Heritage Consulting Inc.



## Learning objectives

1. Understand current economic challenges facing state-owned historic sites across the US
2. Learn about innovative policy responses by several state governments to steward their historic sites in light of current economic challenges.
3. Abbreviated version of presentation at AASLH Sept 2011

Heritage Consulting Inc.



## Illinois Historic Preservation Agency

- Operates 60 historic sites and memorials, ranging in scale from small cottages to 2,000 plus acres of prehistoric mounds.
- 26 Staffed historic sites
- Abraham Lincoln Presidential Library & Museum




Heritage Consulting Inc.

4

### What IHPA wanted to learn



- Alternative operating strategies & best practices
  - Finding New Revenues
  - Reducing Expenses
  - Restructuring Operations



Heritage Consulting Inc.

### State budget problems

- Historic sites under threat

Heritage Consulting Inc.

### The issues are national in scope

- 11 Most Endangered by NTHP in 2010
- "Historic Site Stewardship in the 21st Century" conference at Kykuit 2007
- *New Solutions for House Museums*, Donna Ann Harris 2007
- Articles in *Forum Journal* and *History News* 2007 and 2008



Heritage Consulting Inc.

### State policy responses

- Expanding Revenue
- Restructuring Operations
- Reducing Expenses




Heritage Consulting Inc.

## A. Expanding Revenue

- 1. Statewide Sponsorships California



In-Park Partner Events  
Hearst Castle, Golden Gate Park, Redwood Forest



Heritage Consulting Inc. 

## Statewide sponsorship lessons learned

- Historic parks are less interesting to sponsors than traditional parks
- Whole systems vs. individual parks
- Chicago market easy to sell—but there is only one IHPA site there-Pullman
- Partnering with Dept. of Natural Resources may yield better sponsorship success

Heritage Consulting Inc. 

## Statewide sponsorships California

- California State Parks & California State Parks Foundation (Nonprofit partner)
- Proud Partners Program
- *The California State Parks Donor and Sponsorship Guidelines*
- Identify assets to be sponsored
- Role of marketing firms

Heritage Consulting Inc. 

## B. Restructuring operations

1. Local Partner Agreements
2. Privatization



Heritage Consulting Inc. 

### 1. Local partnership agreements: Ohio

- Ohio Historical Society administered 59 historic sites in 2007
- 1981-2004, 14 sites were moved to local management
- Budget crisis in 2009
- Today OHS only manages 10 sites




Heritage Consulting Inc.

### 2. Privatization—California

- Definition
- Expanded visitor services
- Strong Market vs. Weak Markets
- Drafting process for privatization offerings

Business services

- Lodging
- Food/beverage
- Retail/gift shops
- Special event rental
- Tour programs
- Special programs (horses, crafts etc.)



Heritage Consulting Inc.

### Local partnership agreements: Ohio

- 48 sites are managed by 41 “friends of” organizations
- New local partnerships
- Small financial annual subsidy
- Capital improvements, major maintenance, security, technical assistance staff, training from the OHS staff.




Heritage Consulting Inc.

### Privatization--California

- Gross receipts leases most common
- Risk/reward to state and concessionaire
- Larger buildings/spaces
- California examples
- Facilities Improvements
- Transparency




Heritage Consulting Inc.

### C. Reducing expenses

- 1. Reduced Operating Hours & Site Closures
- 2. Resident Curators



Heritage Consulting Inc.



### Reduced hours & site closures: PA

- 13 actively managed sites
- 10 more management agreements with nonprofits
- One maintenance staff
- Reduced hours
- No subvention to managed sites



Heritage Consulting Inc.



### 1.Reduced hours & site closures: PA

- 60 sites in 1980s
- Blue ribbon panel, 27 "Placed Properties"
- Planning Our Future: Sustainability Committee Final Report
- 2009 severe budget cuts
- 75 site staff furloughed
- 25 retired



Heritage Consulting Inc.



### Reduced hours & site closures

- Closures as bargaining tools
- Not politically popular
- Reduced hours in a union environment
- Closures don't save a lot of money



Heritage Consulting Inc.



## 2. Resident curatorship

- Definition
- MD, CT, DE, MA, NY, NJ (legislation)
- What's in it for resident curator
- What's in it for the state
- Best prospects for successful RFP



Heritage Consulting Inc.



Find this presentation on-line

<http://www.heritageconsultinginc.com/blog/?p=2345>

Heritage Consulting Inc. Blog.

Heritage Consulting Inc.



## Resident curator

- Agreement length
- Restoration plan/schedule
- Tenant pays all restoration costs
- RFP process
- CT Building assessment
- Public access days



Heritage Consulting Inc.



## Contact me!

Donna Ann Harris  
 Heritage Consulting Inc.  
 422 South Camac St.  
 Philadelphia, PA 19147  
 215 546 1988

Heritage Consulting Inc.

