



1-1-2008

The Privatization of American House Museums: Three Case Studies

Sarah Lauren Wade
University of Pennsylvania

Follow this and additional works at: http://repository.upenn.edu/hp_theses

Wade, Sarah Lauren, "The Privatization of American House Museums: Three Case Studies" (2008). *Theses (Historic Preservation)*. 116.
http://repository.upenn.edu/hp_theses/116

A thesis in Historic Preservation Presented to the Faculties of the University of Pennsylvania in Partial Fulfillment of the Requirements of the Degree of
Master of Science in Historic Preservation 2008.

Advisor: Gail Caskey Winkler

This paper is posted at ScholarlyCommons. http://repository.upenn.edu/hp_theses/116
For more information, please contact libraryrepository@pobox.upenn.edu.

The Privatization of American House Museums: Three Case Studies

Abstract

My interest in the subject of the management and mismanagement of small museums was inspired by my experience volunteering and interning with the Philadelphia Ship Preservation Guild. I volunteered with the PSPG from January to September, 2007 and was an unpaid summer intern there from May to July, 2007. I experienced first hand the challenges and the frustrations of managing a small historic structure with limited resources. In this case, the historic structure is a 124-year-old Portuguese fishing barkentine, the *Gazela Primiero*. She was brought over from Portugal in 1974 by a group of concerned volunteers to save the ship from being turned into scrap. An all-volunteer team flew to Portugal, bought the ship, and sailed her back to Philadelphia. After *Gazela* arrived safely at her new berth, the volunteers faced the even greater challenge of building a non-profit foundation to support their mission. In the early 1990's, the Foundation's mission expanded to include teaching maritime history, representing the city of Philadelphia at public events, with the ultimate goal of raising funding and public support for *Gazela's* continued maintenance and preservation as well as the preservation of another acquisition, the 1924 steel tugboat *Jupiter*.

Comments

A thesis in Historic Preservation Presented to the Faculties of the University of Pennsylvania in Partial Fulfillment of the Requirements of the Degree of Master of Science in Historic Preservation 2008.
Advisor: Gail Caskey Winkler

THE PRIVATIZATION OF AMERICAN HOUSE MUSEUMS:
THREE CASE STUDIES

Sarah Lauren Wade

A THESIS
in
Historic Preservation

Presented to the Faculties of the University of Pennsylvania in
Partial Fulfillment of the Requirements of the Degree of

MASTER OF SCIENCE IN HISTORIC PRESERVATION
2008

Advisor

Gail Caskey Winkler

Lecturer in Historic Preservation

Frank G. Matero

Program Chair

Professor of Architecture

Dedicated to my mother, Lisa Jennifer McCaffree
Wade and my father, Richard Lance Wade, who never let
me give up and always told me that I could do this.

Table of Contents

Chapter One: Interests and Motivations.....	1
Privatization Defined.....	4
Government Assistance.....	7
Why Do House Museums Fail?.....	9
Problems in Governance.....	10
Problems in Programming.....	13
Chapter Two: Elfreth's Alley.....	19
Chapter Three: Carter's Grove Plantation.....	28
Chapter Four: The Robert E. Lee Boyhood Home....	38
Chapter Five: Conclusions.....	50
Interviews.....	57
Bibliography.....	59
Index.....	67

Acknowledgements

I would like to thank my advisor, Dr. Gail Winkler, for her constant encouragement, meticulous editing and for making me work up to a higher standard.

Thank you to Donna Ann Harris, my reader, who guided me towards good sources of information and forgave me for my lateness.

Thank you to Dr. David Finkel and Mrs. Sue Finkel, who helped smooth my path so I could focus on my work. Thank you for all your help and your tremendous kindness.

Thank you to my faithful friends, who have talked me down off the ledge on many occasions.

Thank you to Mr. Ross Bradford of the National Trust for Historic Preservation, who took time out of his day to explain easements and sent me the difficult-to-find historic structures report that enabled me to finish this.

And finally, I would like to thank all the volunteers and staff of the Philadelphia Ship Preservation Guild, for teaching me, giving me shelter, and helping me to find my thesis topic.

Chapter One: Interests and Motivations

My interest in the subject of the management and mismanagement of small museums was inspired by my experience volunteering and interning with the Philadelphia Ship Preservation Guild. I volunteered with the PSPG from January to September, 2007 and was an unpaid summer intern there from May to July, 2007. I experienced first hand the challenges and the frustrations of managing a small historic structure with limited resources. In this case, the historic structure is a 124-year-old Portuguese fishing barkentine, the *Gazela Primiero*. She was brought over from Portugal in 1974 by a group of concerned volunteers to save the ship from being turned into scrap. An all-volunteer team flew to Portugal, bought the ship, and sailed her back to Philadelphia. After *Gazela* arrived safely at her new berth, the volunteers faced the even greater challenge of building a non-profit foundation to support their mission. In the early 1990's, the Foundation's mission expanded to include teaching maritime history, representing the city of Philadelphia at public events, with the ultimate goal of raising funding and public support for *Gazela's* continued maintenance and preservation as well as the preservation of another acquisition, the 1924 steel tugboat *Jupiter*.

Since the mid-1990's, the PSPG has struggled to balance the need to keep *Gazela* sailing with the enormous cost of maintaining her adequately. Just to leave the berth at Penn's Landing for a short trip costs the Guild approximately \$2,500 in fuel, oil and other supplies.¹ A lack of professional staff has hampered efforts to raise funds to make major repairs. As of summer 2007, *Gazela* was approximately two years overdue to be hauled out at a shipyard in Maine for professional repairs estimated to cost between \$60,000-\$70,000. Many of the more urgent repairs over the last five years have been performed on credit. A lack of professional staff means that no one is available to write grant applications that might help pay for repairs and enable the Guild to hire personnel. Currently, their office at Penn's Landing in Philadelphia is staffed full-time by two volunteers and many members, along with some of *Gazela's* volunteer crew, are considering retiring or cutting back on their volunteer hours due to advancing age or the demands of full-time jobs. Tour admission fees and merchandise sales are rarely sufficient to make an impact on yearly expenses. The Guild does have a small endowment from the Wyckoff-Smith family, which provides about \$50,000 per year for repairs and maintenance, but it cannot be used to address organizational shortcomings, such as a lack of staff to handle grant

¹ Personal Communication, Jesse Lebovics, *Gazela* engineer and volunteer, June 2007

writing and publicity. As a result of these conflicting interests and priorities, the Guild's efforts to improve public relations and increase its visibility within the historic community of Philadelphia are severely hampered.

Many of the PSPG's current administrative and financial problems have their parallels in house museum management. However, there is reason to hope that the PSPG is ready to make changes to save their organization from further financial difficulties. In February, 2008, a committee of PSPG members released the first draft of a five-year strategic plan to establish and fund a new maintenance program for *Gazela* and *Jupiter* and pay a professional staff. Progress has already been made towards making the plan a reality; for example, the Guild board hired their first professional marketing director in January 2008 whose primary responsibility is creating publicity materials and submitting grant applications. The Guild is also seeking sufficient funding to hire three more full-time professional staff members before the end of 2010, as well as a part-time crew of professional carpenters and craftsmen to assist the volunteer crew. There is also a comprehensive plan to raise grant money needed to pay for new organizational development, but so far, an effective grant-writing program is a plan in theory but not in practice. However, the PSPG has also conducted two formal surveys to identify the

concerns of their volunteers and address those concerns in their five-year financial plan. The conundrum for the PSPG as well as for other non-profit organizations is that they need professional staff in order to apply for grants, but need a steady supply of grant money in order to pay professional staff. Often, the only thing keeping organizations in similar situations afloat financially is the generosity of their members and boards of directors, some of whom pay for emergency expenses out of their own pockets. Without comprehensive financial planning, groups responsible for small museums may be headed toward collapse. In extreme cases, privatization may be the only way for them to recoup financial losses, satisfy their organization's creditors, and insure the continued existence and historic integrity of their properties. Luckily, in the case of the PSPG, there is a core of committed volunteers willing to implement any changes necessary to better secure the financial future of their organization and historic ships.

Privatization

Privatization in its simplest form is the sale or transfer of property from a non-profit organization to a private owner in order to ensure the continued existence and preservation of the property. It may be

protected in whole or part by easements or use restrictions, depending on a number of factors, including the condition of the historic structure, its collection, and whether there is a local historic preservation group ready to accept the task of holding and enforcing easements. The easements can cover the exterior and the interior of the structure, depending on a variety of factors, such as the provenance and historic integrity of the surfaces, movable objects, and structural elements, their significance to local and state history, and the physical condition of the building and its utilities.

Paul Starr, Princeton University sociology professor and Stuart Chair of Communications and Public Affairs, discusses the sociological definition of privatization:

'On the other hand, when we speak of public opinion, public health, or the public interest, we mean the opinion, health, or interest of the whole of the people as opposed to that of a part, whether a class or an individual. Public in this sense often means 'common', not necessarily governmental. The public-spirited or public-minded citizen is one concerned about the community as a whole. But in the modern world the concepts of governmental and public have become so closely linked that in some contexts they are interchangeable. The state acts for the whole of a society in international relations and makes rules binding on the whole internally.

Public thus often means official. In this sense a 'public act' is one that carries official status, even if it is secret and therefore not public in the sense of being openly visible. Indeed, according to the *Oxford English Dictionary*, private originally signified 'not holding public office or official position.' As Albert Hirschman points out, this is a meaning that survives in the army 'private', that is, the 'ordinary soldier without any rank or position.' Now, of course, private is contrasted with public

to characterize that which lies beyond the state's boundaries, such as the market or the family.'²

Starr's definition relates to the dual nature of the house museum as a private home which has been converted into a public space, with thousands of visitors filing through its hallways seeking a glimpse of the past. Many have furniture, books, decorations, toys and other ordinary objects all arranged as they might have been in the museum's former life, in order to make the experience as vivid and personal as possible. A house museum belongs to its local community in a unique way, because its facilities are open to the public, not only for visiting daily; the house and its grounds can be a home for meetings, fundraisers, social events, public performances, concerts and contests, to name just a few. Local community members become attached to a house museum, not only because of their proximity, but because of the local history that the house represents and its usefulness as a way to bring together their community. None of this would be possible without the dual nature of the house museum as a public attraction that allows a private view into the daily life of a family that is long gone.

² Starr, Paul. "The Meaning of Privatization" *Yale Law and Policy Review* 6 (1988): 6-41. This article was reprinted in Alfred Kahn and Sheila Kamerman, eds., *Privatization and the Welfare State* (Princeton University Press, 1989).

Government Assistance

Some non-profits have chosen to turn over ownership of a property to the state government when they are no longer able to maintain it. One example of this type of transfer is the Adel Historical Society in Adel, Iowa. The Historical Society board of directors could no longer maintain an 1857 house museum due to termite damage and outdated utilities and closed it down. They sought out the Adel city government, who agreed to accept the property as a donation in 1998 without protective easements. The city government arranged for all repairs and maintenance as part of a co-stewardship agreement with the local Main Street program. The Adel City Manager's office was instrumental in organizing volunteers and local businesses to participate in a three-year restoration effort. Local organizations and individual sponsors donated approximately \$67,000 to finance termite removal and to upgrade the furnace and air conditioning. The house reopened as the Adel Historical Museum in 2002 and is now managed as a cooperative effort between the City and the Main Street Program, enabling them to pool their expertise and resources. The

local Main Street program staff runs daily tours in the spring and summer months.³

Another successful transfer of a house museum to a government agency's ownership occurred in Deadwood, South Dakota, when the Historic Adams House was joined to the Adams Museum in 2000, under the auspices of the City of Deadwood and a board of directors composed of local laypeople and preservationists. The board administers the house's collection of furniture and artifacts while the city owns and maintains the structure's interior and exterior.⁴ In both instances, there is constant cooperation between professional preservationists and local community members at all levels, overseeing day-to-day site operations as well as long-term financial planning. This type of co-stewardship agreement between private and public entities helps to ensure financial stability and a high standard of preservation and maintenance.

According to Donna Ann Harris, founder of Heritage Consulting, Inc. and author of *New Solutions for House Museums*, "This management arrangement, which they call a co-stewardship agreement, placed both the city and the Adams House board on equal footing regarding the

³ Harris, Donna Ann. *New Solutions for House Museums: Ensuring the Long-Term Preservation of America's Historic Houses.* AltaMira Press, Lanham, MD. 2007. p. 225-227.

⁴ Harris, p. 121-126

overall preservation of the house and its contents. The city provides half of the funds to operate the site each year, and the Adams House board must raise an equal share."⁵

However, the questions to be asked before privatization can even be considered as an option: is the primary goal of such a decision saving the historic property or unloading a depreciating asset? How can the board of directors of a non-profit balance their financial and organizational goals with their responsibility to a historic structure that has been entrusted to them? Is it necessary to sell all or part of a house museum in order to save it? Is privatization a viable choice for struggling non-profit and historic preservation groups? This thesis will examine three case studies of house museums in different stages of the privatization process in order to evaluate successes and failures in returning or introducing historic properties to private ownership.

Why Do House Museums Fail?

Non-profits can fail for a number of reasons, including stratified leadership and a lack of financial planning due to the absence of clear lines of communication between staff members, directors, and

⁵ Harris, p. 123

volunteers. Often communication only becomes a concern in the event of an emergency, such as a maintenance problem or a budget deficit. However, if house museum operators wait for problems to occur before honest discussion with their friends and supporters, they may already be contributing to a situation that puts their house museum at risk of closure. As Donna Ann Harris discusses in her book some of the ethical and legal issues house museum directors should consider in their planning efforts:

Your board may have treated the site for years or even generations as an artifact to be conserved, rather than a piece of real estate to be used to subject to market pressures.....House museum stewards, unlike private investors, are unconcerned about sale prices of comparable properties. As an educational and exhibiting organization, the site's value is essentially priceless except as a basis for insurance policies. The building suffers by this analysis because its upkeep and maintenance becomes less than paramount considerations.....Because the house museum's main asset, the historic building, is viewed as a community asset and held in trust for the public, there may be little interest or concern about long-term planning for the building because an unspecified future board would wind up with the responsibility. No current board member may feel any pressure to plan for the building's future, especially in the board is now comprised of energetic and committed people.⁶

Problems in Governance

However, the privatization process can be influenced by a house museum's leadership and how carefully or carelessly boards of

⁶ Harris, p. 36

directors plan ahead to secure the financial and historic integrity of their organizations, however big or small. Dina Kanawati's research on the financial situation at sites such as the Ebenezer Maxwell Mansion in Philadelphia and Fonthill in Doylestown, Pennsylvania, is revealing in terms of the untenable economic position in which some house museums find themselves. The organizations that run the two sites can move neither forwards nor backwards to help themselves out of budget deficits, in part because they have little in the way of endowments. They lack the wherewithal to improve visitor programs or start publicity campaigns that might help them attract the benefactors and visitors needed to succeed in the highly competitive house museum market.

While some might find it difficult to think of a non-profit historic foundation in terms of competition and improving economic value, Dina Kanawati states that it is essential for house museum directors and staff to re-think their mission statements in those terms if they are to survive. She posits that a lack of communication between the board of directors, staff, and volunteers is a sign of potential house museum failure.⁷ A lack of communication regarding funding deficits can also be a major factor in non-profit organizations failing to plan

⁷ Kanawati, Dina. "Founding or Funding: Are Historic House Museums In Trouble?" Master's Thesis, University of Pennsylvania School of Design, 2006. p. 5

adequately. She goes on to discuss the need for professional financial management in all aspects of house museum money management, from bill-paying to hiring staff to soliciting for public donations as well as the possibility of hiring publicists and financial consultants, in order to make their organizations leaner, more transparent, and more competitive.⁸ By clarifying financial processes for the public and finding new ways to reach visitors and communicate their needs, a site will be well on the way to earning a share of the public's interest and support as well as securing major benefactors for the future.

Kanawati theorizes that a lack of visitation to house museums is symptomatic of a larger problem of underfunding, understaffing and lack of consistent attention and support from the public they serve.⁹ Another contributing factor are outdated or stale tours and visitor programs that fail to address the interests and needs of the audience, such as younger children, who quickly become bored and restless listening to a standard guided tour of portraits and artifacts. Kanawati also promotes greater involvement by the board of directors in every aspect of the house museum experience, especially in creating a constant flow of information between operations staff and the board, which relates closely to renewing visitor programs and keeping

⁸ Kanawati, p. 30

⁹ Kanawati, p. 2

information sources, such as pamphlets and websites, regularly updated. The board should also create a mission statement that attracts and enlightens the public as to the unique historical and cultural experience the site offers. The mission statement should not only define the purpose of the museum's existence, but also define the values that motivate the interpretation of the site. The board can and should contribute ideas about improving tour programming and public outreach and assist in renewing and revamping those programs regularly.¹⁰

Problems in Programming

Sabra Smith examines public relations and visitation, focusing her analysis on the visitor's experience at a historic site and how that experience is influenced by the efforts of directors, preservationists, and staff to attract visitors. For example, at Colonial Williamsburg, she analyzed the new "Revolutionary City" program, a two-hour live historical reenactment complete with costuming and sound effects, which began in early 2006 and has become one of their most popular

¹⁰ Kanawati, p. 31

attractions.¹¹ Smith extrapolates from her analysis of “Revolutionary City” several recommendations for how historic site operators can revitalize their visitor programs and attract new types of audiences without losing the authenticity and the unique historical experiences that visitors are seeking.

Children and senior citizens tended to receive the program very differently; children were often initially interested in the costumes and music and bored by the rest of the performance, which can have a negative impact on the number of families planning return visits.¹² Historic sites must pursue and attract their share of the public’s attention if they are to survive. Colonial Williamsburg, recognizing this, recently opened new programs adaptable to younger age groups and special interest groups, such as adults interested primarily in architecture or African-American history. These efforts are only a small part of the Colonial Williamsburg Foundation’s plan to re-focus its mission on preservation, draw in a new generation of visitors and re-stabilize itself financially.¹³ One of the most visible features of their restored mission statement has been their transparency in their dealing

¹¹ Smith, Sabra. “Dead Men Tell No Tales: How Can Creative Approaches To Communication Keep Historic Sites From Going Silent?” Master’s Thesis. Philadelphia: University of Pennsylvania School of Design, 2007. p.10

¹² Rozhon, Tracie. “Houses Sell and History Goes Private.” *New York Times*, 31 December 2007.

¹³ Personal communication, Thomas H. Taylor, Director of Architectural Archives, Colonial Williamsburg, 29 January 2008.

with the public and their donors, before, during and after the sale of Carter's Grove Plantation. However, they have a long way to go to make up the ten-year budget deficit that began growing in the mid-1990's.

Smith credits the success of rebounding visitor numbers at the Colonial Williamsburg to the development of new programs targeted specifically to children, teenagers and families. Forming partnerships with public and private entities can also help to attract patronage from the historic communities of Virginia.¹⁴ This is one form of creative communication that she believes is important to the success of historic sites. There are other forms of communication that have an impact, such as signage and the visual organization interpretation of artifacts. She compares the Betsy Ross house with the Powel House by their effectiveness at interpretation and making their piece of history accessible to visitors of varying age groups and interests.¹⁵ Recognizing the house museum market as a competition for limited resources, Smith uses the Powel House and the Landmarks Project as illustrative examples of this competitive attitude in house museum

¹⁴ Smith, p. 18

¹⁵ Smith, p. 22-24

management and how such an attitude can help small museums to be successful.¹⁶

Smith also cites the revivification of The Mill at Anselma in Chester Springs, Pennsylvania as an example of a site that has undergone a major use change supported by strong public involvement. In the mid-1990's, The Mill at Anselma was a crumbling 250-year-old set of former industrial buildings lacking a cohesive preservation plan or historic context. However, with a creative promotional and interpretive plan, the directors of the Mill at Anselma Preservation and Educational Trust turned the site around, attracting visitors from all over the state, restoring accessibility to the site by removing undergrowth, stabilizing buildings and replacing the waterwheel. To cap their efforts, they held a party for the entire town to celebrate the elevation of the site to National Historic Landmark status as well as their fully-functional historic grain mill.¹⁷

Smith also mentions that while the pool of potential house museum visitors continues to expand, many historic house museums continue to lose visitors and struggle to fulfill their financial obligations, especially in Philadelphia, where the house museum market is

¹⁶ Smith, p. 38-44

¹⁷ Smith, p. 60. The Mill at Anselma is now a fully operational corn and flour mill and visitors grind and purchase their own bags of flour, which is a major source of revenue for the site.

oversaturated with small, volunteer-managed houses. One example is Lemon Hill Mansion in Fairmount Park, Philadelphia, Pennsylvania, which has rarely had enough visitors to support its historical and education programs in its fifty years as an eighteenth-century house museum. The mansion and grounds have been managed since 1957 by Chapter Two of the National Society of the Colonial Dames of America, a non-profit patriotic group, and their partners, the Friends of Lemon Hill. The cost of maintaining the two-hundred-year-old Federal house has strained the resources of the Friends as well as those of the Colonial Dames. Maintenance costs have also caused tension between the two groups on the need for a public outreach program and how repairs and maintenance should be managed. The leadership of the Friends of Lemon Hill is aging and there are not many younger members who are willing or able to take over the full-time task of administering the site. As a result, much-needed new visitor and educational programs have been very slow to develop.

While Smith and Kanawati may disagree on some of the root causes behind the failure of non-profit-operated house museums to compete, they would agree that there are many reasons to hope that house museums that are willing to adapt their missions to changing audiences and foster clear channels of communication between visitors, staff and directors can survive, even if they are struggling

financially. By revitalizing their visitor programs to attract new and returning visitors and expand their base of supporters and donors, house museum managers can increase their competitiveness in an increasingly competitive house museum market, thereby reducing the chance that at some point in the future, they will have to consider closing their museums in order to solve financial crises or because they are no longer able to adhere to professional standards of preservation practice.

Chapter Two: Privatization Case Study One

Elfreth's Alley: Second Street between Race and Arch Streets, Philadelphia, Pennsylvania

Elfreth's Alley is the oldest continuously-occupied residential street in the United States. The first shops and residences were constructed between 1740-1762.¹⁸ John Gilbert and Arthur Wells combined their small holdings and carved a tiny neighborhood out of William Penn's long block of houses and shops along North Second Street. Elfreth's Alley was an unnamed side street, one of many in the teeming dockside neighborhoods north of High Street. The Alley borders the Northern Liberties, which in the 1730's , was mostly open fields and pastures for carriages and horseback riding for the affluent. From its earliest days, Elfreth's Alley was inhabited primarily by German immigrants escaping war and religious persecution in Central Europe.

¹⁸ Moss, Roger W. and Crane, Tom. *Historic Houses of Philadelphia: A Tour of the Region's Historic Homes*. University of Pennsylvania Press, Philadelphia, 1998. p. 28

Irish immigrants were later additions to the area, fleeing famine as well as political and religious oppression.¹⁹

The alleyway received its name from Jeremiah Elfreth, a blacksmith who owned several houses along the narrow, unpaved street. The houses that currently line it were built between 1728 and 1736 in Georgian and Federal style. Bladen's Court, created by three houses facing each other across a tiny courtyard centered around a water pump, is also a part of the Elfreth's Alley neighborhood and contains some of its oldest houses. A modern replica of the pump stands in Bladen's Court today.

Workmen "of the lower sort", laborers and immigrants from all over Europe settled into ramshackle neighborhoods of one and two-story wooden and brick houses along Philadelphia's waterfront. Philadelphia would experience one of its greatest periods of expansion in the last half of the eighteenth century.²⁰ The tenements near the Delaware River became a haven for religious and cultural diversity. Elfreth's Alley itself was a microcosm for the new economic boom. Inhabitants sold fruit, vegetables, rags and other commodities of all kinds as they walked up and down through the crowds. Many

¹⁹ Elfreth's Alley official website. www.elfrethsalley.org/history.htm. Accessed 2/4/2008.

²⁰ Independence Hall Association official site. "Historic District North of Market Street." <http://www.ushistory.org/districts/marketstreet/alltogether.htm>. Accessed 4/29/2008

immigrants were able to take advantage of the accompanying economic expansion and became enormously successful in trade, shipping, shipbuilding and other industries along the Delaware River waterfront. Many more struggled to adapt to their new country, practicing their trades in small cottage industries, usually house-based and employing three to five people who were typically family members. These crowded neighborhoods became some of the most racially and religiously diverse communities in the colonies. By creating a surplus of goods and services, they gave rise to the informal and formal trade networks that helped make Philadelphia an economic powerhouse, one of the most important cities of the American Revolution, and later, the new American nation.

The neighborhood actually dwindled to a population of only a few dozen in the 1920's, when many single-family houses and apartment buildings were converted into warehouses or demolished. With the purchase of the rowhouses by the newly- formed Elfreth's Alley Association in 1934, a core of concerned residents was created to prevent further damage to the historical and architectural character of the neighborhood. The new organization dedicated itself to protecting the few remaining 18th-century rowhouses from demolition by the Weatherall Paint Company, which had purchased property along one side of the street with the intention of building a

factory.²¹ The residents raised ten thousand dollars overnight in order to purchase the houses on the north and south sides of the street, as well as those on Bladen's Court, which sits behind the south facing row.

Elfreth's Alley is now surrounded by a post-industrial neighborhood that is gradually turning into a desirable location for developing high-end apartments, condominiums and rowhouses. Houses are individually owned and the exteriors of five are protected by stringent easements. The privatization process began in 1986 with the Board of Directors' decision to end the rental of the rowhouses to individuals and families. This decision and the debate leading up to it was long and complex for a number of reasons. First, revenues from rent were not enough to cover the cost of restoring the row houses. Second, directors as well as the staff were spending too much of their time and resources acting as landlords. Third, the occupied houses were subjected to excessive wear by frequent turnover in tenants and it was difficult to convince renters to invest in maintaining houses that they did not own. Finally, administering the rental units distracted the Board from the primary mission of protecting and preserving the three-hundred-year old alleyway.

²¹ Personal communication, Cory Kegerise, Executive Director of Elfreth's Alley Association, 10/19/2007

The sale of the rowhouses was a gradual process and involved not only the Board of Directors, but all of the members of the Elfreth's Alley Association (hereafter EAA). The Board of Directors determined to focus its mission on restoration and preservation. According to Cory Kegerise, the executive director of the Elfreth's Alley Association, the Board believed that being a landlord distracted from its primary mission of preserving the historic street as a whole. The responsibilities of administering so many rental properties took up too many of their financial resources as well as their time. With the consensus and full cooperation of the members and Directors, the property was gradually divided up and sold into private hands, with the exception of two adjoining houses at the center of one row, number #126 (interpreted as The Mantuamakers' House) and #124, which was converted into office space and a small gift shop. Easements were created and applied to each structure individually, based on the EAA's conditions assessment of each house. House No. 114 and No. 1 and 2 Bladen's Court were sold first, with easements protecting their exteriors from major alteration without the prior approval of any building plans by the EAA board.²² The Association also requires yearly inspections of the houses to ensure that they are being appropriately maintained. The easement agreement also gave the EAA the ability

²² Harris, Donna Ann. New Solutions for House Museums, p. 200. Endnote #46

to veto any alteration to the exterior of any of the five houses. The right to inspect and veto any change is held by the EAA in perpetuity. At a board meeting in 1987, the members and directors took a vote to permit the current lease agreements to expire the following year and gradually renovate the houses. In 1988, after more than thirty years of debate, the Association decided by a vote of 29 to 4 to sell most of the houses to private owners, maintaining #124 and #126 as public sites for visitors.

After reaching the difficult decision to privatize, the EAA initially asked the Philadelphia Historic Preservation Corporation (now known as the Preservation Alliance for Greater Philadelphia) to hold the easements on the first three houses up for sale, as well as the rest of the houses they planned to prepare for sale. However, the PHPC refused to hold the easements, as they had all been re-pointed with Portland cement in the 1960's. Repointing with this material led to a number of conservation problems, as Portland cement dries to greater hardness than the bricks it holds together, making facades very difficult to maintain and repair.²³ The PHPC did not want the task of perpetual enforcement and inspection, so the EAA deferred their plans to sell the houses. In 1981, the EAA instead decided to establish

²³ Harris, p. 200. Endnote #57

and enforce easements internally and sell the houses, rather than ask outsiders to take on the task.

The easement process, as drawn out as it was, turned out to be a positive step forward for the organization. Taking control of the easements themselves, rather than handing them over to an external agency, reassured EAA members that the board of directors would maintain a protective watch over the houses. The EAA was then able to focus their manpower and funding on promoting and preserving the site. This had the added benefit of drawing public attention and private funding to the EAA's preservation efforts. Their decision to re-focus their mission has not only had long-term positive effects for their membership, but has also helped revitalize the surrounding neighborhood and encourage tourism from the late 1980's to the present day.

Today, the EAA board of directors is constantly reassessing the mission and priorities, while honoring the founding principles of their predecessors. One example of their commitment to fostering public investment of time and money in the Alley is the variety of annual public events, including the popular "Deck the Alley" event held in early December, when Philadelphians are extended an open invitation to spend the day decorating the Alley's brick facades with

greenery, ribbons and Christmas ornaments. In recent years, “Deck the Alley” has become one of the most famous holiday events in Philadelphia, with volunteers from all over the area participating. The board members also show their commitment by keeping their mission statement current and clearly defined, both for their membership and for the public as a whole. The public is well-informed on what the EAA is doing and its plans for the future. The houses are carefully preserved and represent some of the finest Georgian architecture in Philadelphia, however, as they state on their website and in annual publications, the primary mission of the EAA is to publicize the stories of ordinary people who have been forgotten in the formal histories of great cities, such as the immigrants who came to Philadelphia to start new lives in the land of opportunity.

In addition to acting as mediator between residents and visitors, Cory Kegerise, the executive director of the Elfreth's Alley Association, also works with the EAA board of directors to ensure the preservation of all of the houses in the Alley and Bladen's Court. He manages the flow of thousands of visitors through the cobblestoned alleyways and courtyards every year at the same time protecting the integrity of the rowhouses as private residences. Balancing these different agendas can be difficult, as visitors often may not understand the dual nature of the site and attempt to enter private

houses, assuming that they are part of the standard tour, which can be disconcerting for residents and visitors alike. Two of the houses are open to visitors, however, and the free flow of information to the public on the EAA's history, mission and current preservation efforts are visible everywhere. The offices of the EAA staff and executive director are on-site. Volunteer docents supervise the site and provide tours every weekday. The staff and docents are widely-informed and well-educated on the significance of the site to the history of Philadelphia. Tours and events are well-publicized and consistently well attended, whatever the weather or season. The site is well publicized by word-of-mouth and by promotional literature distributed by the Greater Philadelphia Tourism Marketing Corporation as well as the pamphlets handed out at other historic sites in the city, such as in the visitors' center of Independence Hall National Historical Park.

Chapter Three: Privatization Case Study Two

Carter's Grove Plantation: Eight Miles East of Williamsburg, Virginia

Carter's Grove is not only an example of a well preserved and carefully stewarded eighteenth-century plantation, but also an excellent example of a historic site operated by a non-profit foundation that has been transferred into private ownership with a minimum of rancor and legal wrangling. Carter's Grove is a textbook example of how the privatization process should be conducted by a non-profit that is interested in conducting a sale while also maintaining good relations with its supporters, donors and the general public.

History of Carter's Grove Plantation

Originally known as Martin's Hundred, the patch of land that would someday be known as Carter's Grove Plantation was the site of one of the oldest British settlements in Virginia. It was established long before the widespread settlement of the James River area by Europeans and like many pre-colonial settlements, not much is known

of the people who lived there. Many settlements were short-lived due to disease and conflicts with Indian tribes. The earliest Europeans established Wolsteholme Towne in approximately 1619.²⁴ The village declined during a major Indian revolt in 1622 and was abandoned in 1650.²⁵ The land was sporadically farmed until the mid-1700's. Carter Burwell, a wealthy planter and the grandson of Robert "King" Carter, designed the main house himself and hired master builder David Minitree to supervise construction in 1750. Samuel Bayliss, a master joiner, moved to Virginia from England in 1751 at Burwell's expense to decorate the first floor parlors and main entranceway to the house in intricately carved classical designs. The two-story brick house was completed in about 1753 as a large Georgian block flanked by two smaller, separate wings containing kitchens, storerooms and offices in a scale and style meant to imitate the great country estates of Great Britain. Burwell was so pleased with the finished product that he made Minitree a generous gift of twenty-five pounds. The Burwell family account books are all that survive from the construction period and as a result, little else is known of Minitree, Bayliss, or other craftsmen who worked on the house.

²⁴ Hume, Ivor. Digging for Carter's Grove. Colonial Williamsburg Foundation, Williamsburg, 1974.

²⁵ Digging for the Green: Subsurface Buildings www.subsurfacebuildings.com
Accessed 3/15/2008

However, there is much more information available about earlier owners of the property, including the most famous, Robert “King” Carter. When he purchased the mostly undeveloped land along the James River, it contained thousands of acres of trees as well as extremely fertile cultivated land ideal for growing tobacco, which soon became the plantation’s primary crop as British demand grew. The enormous wealth produced by intensive tobacco farming fueled an economic boom in Virginia and helped a few planter families rise rapidly in social and political prominence, including Carter. “King” Carter was one of the wealthiest landowners in the colony, at one point possessing four hundred thousand acres of the best farming and riverbank land, which enabled him to ship tobacco and other crops to England efficiently and inexpensively. He was also fortunate in his family. The Carters were an extensive clan, with blood and marriage ties to nearly every other prominent family in the southern colonies, including the Lees, the Burwells and the Custises. He had eleven children, many of whom were strategically married off to make valuable allies and business contacts in other colonies. The plantation was not actually called Carter's Grove until about 1750. It was originally known as Corotoman Plantation, until Robert Carter passed it on to his grandson, Carter Burwell. Robert Carter included as a codicil to his last will and testament that the land be renamed

"Carter's Grove" and that the name be maintained in perpetuity after his death.²⁶ Within a year of inheriting the vast estate, the mansion was under construction, using slave labor. Around this time, Burwell married Lucy Grymes, the daughter of another prominent Virginia family. Their son, Colonel Nathaniel Burwell, inherited the property in about 1800, although he soon moved his family to Clarke County, where he had just finished supervising the construction of Carter's Hall, a new plantation where he spent the rest of his life. Other Burwells occupied Carter's Grove until 1838, when it passed out of their hands.

Not much information is available on the ownership of the house following the Burwells, although the plantation shrank significantly from several thousand acres to less than a thousand. By 1915, the property was at its current size of four hundred acres owned by Dr. Edwin Booth. He sold everything to Molly and Archibald McRae, who would make more alterations to the house than all of the previous owners combined.

It was not until the 1950's that any type of archaeological or geological investigation was made on the site. Guided by the scholarship and experience of Ivor Hume, a team of Colonial Williamsburg Foundation archaeologists found layers of forgotten

²⁶ Lancaster, Robert Alexander. *Historic Virginia Houses and Churches*. Philadelphia: J. B. Lippincott Co., 1915. p. 54

history, some much older than the story of the Carters and Burwells. They unearthed the remains of early colonial-era slave quarters and the short-lived village of Wolstenhouse Towne, one of the oldest English settlements in North America. Hume's team also discovered abandoned wells partly filled with discarded housewares and weapons dating back to Wolstenholme Towne.

Hume and his assistants spent many years unearthing and studying the stratigraphy of the ruins to establish the positions of several structures from the original colony in relation to the mansion, which is now the oldest extant building on the site. The slave quarters were reconstructed accurately on their original site by Colonial Williamsburg to tell the story of the generations of slaves who built the Burwells' fortune.

Today, Carter's Grove Plantation, located at 8787 Pocahontas Trail, James City County, Virginia, is a large Georgian mansion situated on four hundred acres bordering the James River. The site is approximately eight miles from the center of Williamsburg, Virginia and until 2007, was owned and operated by the Colonial Williamsburg Foundation. The Georgian mansion and four hundred acres of riverside land was sold because it placed a financial burden upon Colonial Williamsburg that was no longer justified by visitor numbers or

by its usefulness as a venue for holding fundraising events. While there are easements to protect the exterior of the house itself, the outbuildings and grounds themselves are also protected by extensive easements enforced by Colonial Williamsburg Foundation, which owned and operated the site from 1963 to December, 2007. In 2007, easements had been placed only on the 18th century mansion, exclusive of its four hundred acres of land and modern outbuildings.²⁷ However, on December 14, 2007, a covenant was signed between the new owner, Mr. Halsey Minor, and the Colonial Williamsburg Foundation, the Virginia Board of Historic Resources, and the Virginia Outdoors Foundation. The Virginia Outdoors Foundation will enforce the easements on the landscape and natural features, while the Colonial Williamsburg Foundation will enforce the easement on the mansion and all manmade structures, such as the outbuildings, reconstructed slave quarters and archaeological museum on the site. All three organizations had input into creating protective easements for the site in its post-sale life. According to the Colonial Williamsburg Foundation press release of December 8, 2006:

Under the terms of the sale a prospective buyer would agree to legally binding restrictions regarding the protected areas of the property. Prospective buyers will demonstrate a commitment to

²⁷ Board of Directors meeting minutes, Virginia Department of Historic Resources, 7 June 2007.

preservation, an interest in colonial history, and the capacity to care for the property.

Areas protected under the agreement include: mansion and plantation setting, James River viewshed and archaeological sites (including the right retained by the Foundation to investigate as-yet unexplored sites). In addition, the Foundation retained the right to use pasture land for its rare breeds program. The property is zoned R-8 (Rural Residential) and the mansion is a historic landmark listed on the National Register of Historic Places and on the Virginia Historic Landmarks Register. Included among special restrictions of the sale, residential and commercial development would be prohibited.²⁸

Halsey Minor has to date fulfilled the above-mentioned requirements, preserving and rebuilding on the site conservatively; in fact, the only change he is currently planning for the main house is the installation of modern appliances and plumbing to make it suitable for his family to occupy. However, he has assumed control of the property with the clear imprimatur not only of local and state historic preservation groups, but also with that of the local community of Williamsburg. Minor, the Foundation and local preservation advocacy groups are committed to working together to appropriately steward the site. The Foundation is now able to act as guides for the site's responsible development and can also re-focus their attention on their core mission and balancing their budget.

²⁸ Colonial Williamsburg press release, *Colonial Williamsburg Foundation to Proceed with Protected Sale of Carter's Grove*. 12/19/2007. Colonial Williamsburg official site.

http://www.colonialwilliamsburg.org/Foundation/press_release/displayPressRelease.cfm?pressReleaseId=655. Accessed 4/29/2008

Most importantly, the Foundation president and board of directors of Colonial Williamsburg have always been candid with their supporters regarding their motivations in regard to Carter's Grove. In the words of Thomas Taylor, director of the Colonial Williamsburg Foundation architectural history department: "In the last couple of years, there has been a major deficit as we've taken on new missions. [Colonial Williamsburg has] redone Woodlands and the Williamsburg Inn in the last five or six years, we've put millions into upgrades and improvements to visitor support and facilities- it's an investment, to get ready and positioned for the future. Carter's Grove just wasn't part of the plan. It's certainly one of those exceptional properties that needs to be preserved. Archaeological, Native Americans and the early colonial period...it has rich historic potential."²⁹

The easement agreement, which was completed in December 2007, protects the interior and exterior of the house as well as the surrounding outbuildings and land. The agreement is comprehensive and will be held and enforced by the Virginia State Historic Preservation Office. Colin Campbell, the president of the Colonial Williamsburg Foundation, stated in a press release announcing the sale on December 19, 2007: "The easement reflects the Foundation's

²⁹ Personal communication, Thomas H. Taylor, Director of Architectural Collections, Colonial Williamsburg Foundation, 1/28/2008. Mr. Taylor supervised general maintenance, interior repairs and mechanical upgrades at Carter's Grove, 2006-2007.

fundamental commitment to protect and preserve the mansion, maintain the integrity of the mansion's view shed and protect the archaeological sites on the property."³⁰ The Virginia Outdoors Foundation will have oversight of any changes to the natural landscape, forested areas, pastures and gardens. The agreement not only protects all the extant historical and natural structures on the site, but also protects all of the site's resources, including unexcavated archaeological sites, oil, gas and any mineral deposits which may be present. This means, essentially, that Mr. Minor or his heirs cannot excavate anywhere on the site for any building project or repair without first consulting with the Virginia State Historic Preservation Office. Before any excavation could be undertaken, an archaeological investigation would have to be conducted by archaeologists from the Colonial Williamsburg Foundation. In addition, all forested areas, pastures and other natural features are to remain undisturbed, although the new owner may build up to two new residential buildings if it does not disturb these areas or the natural landscape of the land or the James River. However, the owners may alter the 20th-century elements of the mansion itself, with the permission of the Virginia Board of Historic Resources and in

³⁰ "CW Achieves Protected Sale of Carter's Grove." Colonial Williamsburg Foundation press release, Williamsburg, VA. 19 December 2007. http://www.history.org/foundation/press_release Accessed 4/12/2008.

consultation with Colonial Williamsburg. However, the 18th-century architectural elements of the interior and exterior may not be altered. Overall, the easement agreement, which totals thirty-seven pages, is easy for laymen to understand and satisfies the most stringent professional preservation standards for the permanent protection of the house's interior, exterior and grounds.

Chapter Four: Privatization Case Study Three

The Robert E. Lee Boyhood Home, 607 Oronoco Street, Alexandria, Virginia

History of the Robert E. Lee Boyhood Home

The Robert E. Lee Boyhood Home, also known as the Potts-Fitzhugh House, is famous not only for its association with a brief period of General Robert E. Lee's childhood, but also for the controversy surrounding its private sale to the Kington family in 2000. Because of the Lee-Jackson Foundation board of directors' decision to make it a secret sale without protective easements, their standing was injured in the historic community of Virginia and the Foundation was investigated by the state attorney general. This case could be considered a good example of how not to conduct the private sale of a non-profit-owned house museum.

The Potts-Fitzhugh House, also known as the Robert E. Lee Boyhood Home, is located at 607 Oronoco Street. The main block has a raised basement, while the wings were built with only small crawl

spaces beneath them. The earliest structure known on the site was “a tobacco warehouse built at the foot of Oronoco Street”, according to the Tobacco Act of 1721.³¹ The warehouse stood until approximately 1749, when John Ramsey, a wealthy merchant, had a two-story house constructed on the site. What became of this house is not known; when the business partners John Wilson and John Potts, Jr. purchased the lot and three others along Oronoco Street in 1794, it was unimproved. That same year, Potts and Wilson then constructed two mirror-image two-story brick residences at 607 and 609 Oronoco Street, that remain today. They intended to build two more on either side of the same size and style, which is why there originally were no windows on the east side of the Potts-Fitzhugh House. Potts also built an office and a stable behind his house. William Fitzhugh, a tobacco planter, purchased it from Potts in 1796, although Potts lived in the house for two more years. In spite of the fairly detailed information available on early owners, the designer of the house is unknown, some historians believe that the design was influenced by Charles Bulfinch, a prominent Boston gentleman architect who lost his inherited wealth in bad investments and turned to architecture to support his family.³² His influence can still be seen in the design of many historic homes in

³¹Archetype, Inc., *Potts-Fitzhugh House, 607 Oronoco Street Historic Structures Report*. (Boston, MA: 2000.) p.1

³² *Historic Structures Report*. p.4

Alexandria. The tobacco warehouse was razed and replaced with a large Georgian brick house sometime later that decade. In 1794, Charles and Frances Alexander sold the property to John Potts, who sold it to William Fitzhugh, who used it as both a residence and an office from 1799 to 1809, when he died and the house was inherited by his son. In 1819, the Fitzhughs turned it into a boarding house for gentlemen, according to a newspaper advertisement in The Alexandria Times and Advertiser from that year.³³ The Fitzhughs were cousins to the Lee family, the most famous scion of which was General Robert E. Lee. His family lived in the house briefly in the 1820s. The future general himself lived there from ages eleven to fourteen, when he left Alexandria to attend West Point Military Academy in 1824. Around this time, part of the L-shaped section was rented as a separate single-family, three-bedroom house. It passed out of the Fitzhugh family's hands in 1820 and had twelve other owners in the following years. The Sayers family owned and occupied it from 1932 to 1941 and made significant repairs, although there is no documentation on file with the city of Alexandria zoning and permits department.³⁴ Finally, the house was sold to Henry Koch, who sold it to the Lee Jackson Foundation in 1963. It was run as a house museum from 1970-2000 by the Lee-Jackson Foundation, a 501(c)(3) non-profit

³³ *Historic Structures Report*. p. 137

³⁴ *Historic Structures Report* p. 136

organization. The property was added to the National Register of Historic Places on June 5, 1986.³⁵

In March, 2000, the site was sold to Ann and Mark Kington and the sale was then presented to the Boyhood's Home's supporters and staff as a fait accompli. The privatization process had legal and ethical ramifications for the historic community of Alexandria and the state of Virginia. The Lee-Jackson Foundation's board of directors apparently did not realize how strongly the citizens of Virginia felt about General Lee's childhood dwelling until it was closed and sold without their input or knowledge.

The historic community of Alexandria had no inkling of the Lee-Jackson Foundation's intentions until the contracts had been signed. One result has been lasting bitterness and distrust among supporters and staff of the Boyhood Home as well as in the historic community of Alexandria. It also spawned an investigation by the Virginia State Attorney General's office in July, 2000, centered on the secretive nature of the sale and the Foundation's financial records.

The Kingtons, seeking to avoid further controversy, offered to sell back the house to any foundation that would restore it to its previous use as a museum. However, the \$2.3 million price combined

³⁵ National Register of Historic Places official website. <http://www.nr.nps.gov/>
Accessed 1-19-08

with the approximately two million dollars needed for repairs was too costly for most local historically-minded groups. Two submitted bids, but did not actually have the financial ability to make all of the recommended repairs and thus, today the house remains in the Kingtons' hands. In April 2000, a month after the purchase, the family allowed a committee of historic preservationists and concerned citizens thirteen months to examine conditions to create a proposal for the restoration and re-use of the house.³⁶ According to articles in the *Washington Post* in Fall 2000, the house had a leaking roof, structural wall damage, outdated heating, cooling and plumbing systems and severe termite infestation at the time the Lee-Jackson Foundation decided to sell it.³⁷ Repair costs were estimated at two to four million dollars.³⁸ A committee of preservationists and concerned citizens examined the house's overall condition and potential for re-use and recommended in summer 2000 that it not be re-used as a museum, but maintained as a private, single-family residence.³⁹ By September 2000, the Kingtons had withdrawn their offer to sell the house and later that fall hired Archetype, Inc., a Boston-based design firm specializing

³⁶ "Invitation for Proposals: Robert E. Lee Boyhood Home, Alexandria, Virginia." *National Trust for Historic Preservation*, 2001.

³⁷ Mizejewski, Gerald. *The Washington Times*. "Owners Hear Pitches For Lee's Boyhood House." 05/12/2000.

³⁸ O'Hanlon, Ann. *The Washington Post*. "Sold Sign On Lee House Jarring; Foundation Sells General's Boyhood House to Private Owner." 03/07/2000.

³⁹ Drummond, Daniel F. *The Washington Times*. "Lee's Boyhood House Won't Reopen As A Museum." 9/15/2000.

in architectural restoration, to take a comprehensive conditions survey and create a preservation plan. In May 2001, the Kingtons announced a plan to rent the house for events after all repairs were completed.⁴⁰

Archetype, Inc. performed an extensive evaluation of the current condition of the house at that time as well as the potential for preservation and re-use. They found the damage in several areas of the house to be extensive, such as the roof, which had been repaired inexpertly several times in the 1960's and 1970's. Due to haphazard roof repairs, water leaked into the upper stories at four locations for decades. Window frames and sashes from the basement to the attic were broken and rotting. Rainwater had flowed into the foundation from all sides and pooled inside the cellar, rather than draining away. Their findings indicated that the foundation had not been properly maintained for thirty to forty years. Several below-grade pipes in and around the base of the structure were corroded, clogged or broken, leading to widespread water damage, such as masonry spalling, microfauna growth and mortar deterioration, thus compromising the strength of at least one structural wall on the eastern side of the house. The foundation is also sagging in several places. The report also studied the history of repairs and reconstructions since 1795 by testing

⁴⁰ O'Hanlon, Ann. *The Washington Post*. "Earley Approves Lee House Restoration; Alexandria Couple Plans to Open House For Events." 5/18/2001.

samples from brickwork, window frames, doors and floorboards in order to determine their age and provenance as well as to help the Kingtons plan their preservation efforts for the future. Archetype also collected drawings and personal accounts of the outer appearance of the house dating back to the 1870's.

As a result of the controversy, which was publicized in state and national newspapers, the Lee Jackson Foundation was the target of criticism, especially from their fellow Virginians in the form of letters expressing shock and dismay, to negative newspaper articles and public pronouncement from prominent preservationists, including one of the directors of Stratford Hall, the birthplace of Robert E. Lee. The Virginia State Assembly passed a law the following year requiring that sale or transfer of ownership of historic properties, defined as any historic structure opened to the public for visitation more than one hundred days a year, be publicized and bids solicited publicly for ninety days before sale.⁴¹ In response to the state attorney general's investigation and the criticism leveled at them, the Lee Jackson Foundation closed ranks and refused to discuss the sale with reporters or release any information to the public, other than that the house was sold. The new owners made public their plans for the future of the

⁴¹ House Bill 2165. "HB 2165 Certain historic properties; notification prior to sale." Adopted by the Virginia State Assembly on 2-16-2001, bill came into effect 7-01-2001.

house, hoping to end the conflict and to promote goodwill with their neighbors. The Foundation, however, has remained silent. Soon after the sale, it removed all information regarding the relationship to the Robert E. Lee Boyhood Home from the website and it has refused to comment to local, state or national newspapers.

While writing her book *New Solutions for House Museums*, Donna Ann Harris tried many times during the spring and summer of 2006 to contact members of the Lee Jackson Educational Foundation by telephone, e-mail and letter in order to gain their perspectives on the events of 2000, as well to determine why the house was not placed on the open real estate market. The LJEF refused to respond to her questions or return her telephone calls, e-mails and letters. In the course of writing this thesis, this researcher also made efforts to contact by e-mail and telephone Stephanie Leech, the administrator of the Lee-Jackson Educational Foundation. John Ackerly, the president of the Foundation, returned a call on Feb. 21, 2008. Mr. Ackerly, a member of the board of directors for twenty years, was elected president in September 2007. In spite of his long association with the organization, he seemed unclear about the operations of the former house museum or the nature of the relations between the Board and the management of the house during the last two decades. He seemed unaware that the board could have placed

restrictive covenants in the sale contract so that the exterior and interior of the house could not be altered or demolished. He was unaware of any damage to the house at the time of sale, except that the furnace needed replacement and that the roof needed repairs, each repair costing \$20,000, in his estimation.⁴² However, newspaper accounts, the 2000 historic structures report and first-hand observers tell a very different story.

Mr. Ackerly was also unsure if the Lee-Jackson Foundation had ever been a member of any professional associations, such as the American Association of Museums, an organization that certifies museums of all stripes throughout the United States. Membership is considered to be an essential benchmark of professional museum management. Neither Dresda Mullings, full-time research curator at the Foundation from 1997-2000, nor Bill Seefeldt, volunteer at the Boyhood Home from 1998-2000, could confirm whether the museum had ever been accredited by or held a membership in any professional association. These may be other examples of the Lee-Jackson Foundation's isolation from the historic community that surrounded it, even when it needed help the most.⁴³

⁴² Personal communication, John Ackerly, February 21 2008, 12 April 2008

⁴³ Personal communication, Dresda Mullings, 14 April 2008, and Bill Seefeldt, Jr. 13 April 2008. In a letter to the editor of the Alexandria Gazette-Packet on 10/19/2000, Seefeldt stated that the LJEF's financial statements and tax returns

This failure to communicate, or to be questioned, examined or criticized, was characteristic of the Foundation's attitude toward the public at the time of the sale and subsequently. This injured their standing within the historic community of Alexandria and probably contributed to the negative public reaction to the sale, as the lack of a statement from the LJEF implied, at best, a lack of regard for the property, volunteers and visitors and at worst, questionable ethical and legal practices while conducting a private sale.

After six years, some of the acrimony raised by the sale has begun to smooth over in the face of the Kington family's careful management of the house, who dropped their plans to use the house as a rental venue based on the National Trust's recommendation. In 2004, the Historic Alexandria Foundation honored Ann and Mark Kington with their annual Preservation Award.⁴⁴ Many Virginia tourism websites include the Robert E. Lee Boyhood Home as part of the historic walking tour of downtown Alexandria, although the house can only be viewed from the outside. On October 8, 2006, the Kingtons held a tour of the house called "Ghosts and Generals" for the public and for members of the Art Center of Orange, VA, hopefully the first of

indicated that they had enough liquid cash on hand in 1999 for roof repair and other needed renovations and the Foundation instead willfully allowed the house to deteriorate. In an e-mail in February 2008, Mr. Seefeldt explained his role during the museum's last two years of operation and what could have been done to save it.⁴³

⁴⁴ <http://www.leeboyhoodhome.com/archive.html> Accessed 2/19/2008.

many events in which the public will be permitted to tour the restored interior. As evidenced by their continuing interest in its preservation, Alexandrians have shown that they still see the Robert E. Lee Boyhood Home as part of the rich history of their city.

There are currently no historic easements of any kind on the interior or exterior of the Robert E. Lee Boyhood Home and there have never been any, according to Ross Bradford, easements lawyer for the National Trust for Historic Preservation. Instead, the National Trust has established a watchdog role over the house and maintains a cordial relationship with the owners. According to Bradford, the owners have a verbal agreement with the administration of the Trust to maintain the house in accordance with the Secretary of the Interior's standards for historic structures, making all necessary repairs, blending them as unobtrusively as possible into the extant structure and using historic materials whenever possible.

The house was originally built as a single-family home, although it has been subdivided and re-united into one residence several times over the last two hundred and seventeen years. The house has served many purposes and suffered considerable wear and tear during its long and varied history. Fortunately, most of the owners left historical materials, such as plaster and wood, damaged but intact on both the interior and

exterior. Most damage-- over-painting, inappropriate repairs and neglect-- occurred during the twentieth century. According to the Historic Structures Report prepared by Archetype, Inc., a surprising amount of eighteenth-century material has survived. The house has had approximately fifteen owners, which makes its endurance even more remarkable. One of the most revealing statements about the Robert E. Lee Boyhood Home controversy came from Marian Van Landingham, state representative of the forty-fifth district of Virginia, retired 2005. In February 2001, she said in a statement to the press regarding legislation that would require a ninety-day period for public notification before a historic property could be sold: "Interestingly, if the foundation which owned the Lee Boyhood House had received a grant for renovation from the state, it would have had to remain open to the public under prior law. Over the years I have gotten such matching grants for just about every other public historic building in Alexandria, but never received a request from the Lee Boyhood House ... despite its need for restoration [emphasis supplied]."⁴⁵

⁴⁵ Van Landingham press statement, *Alexandria Gazette-Packet*, 2/22/2001.

Chapter Five: Conclusions

The three above-mentioned case studies examined in this thesis show that the most important element in conveying a property into private hands is whether all the stakeholders are kept aware of each step in the process and allowed to offer their input. Withholding information from board members or failing to fully inform stakeholders alienates them and can quickly sever good relations between a house museum and its public. The high rate of charitable donations and volunteerism in America suggests that many individuals want to be a part of something larger than themselves and are more than willing to contribute time, energy and money to non-profit causes. The public also wants to visit and support historic sites and house museums- witness the growth in the popularity of historic tourism since the beginning of the twentieth century. By committing to consistently involving the community of residents, laypeople and preservationists alike in major decision making, the Elfreth's Alley Association show that it expects and requires that community to invest in it. In return for their investment of time, the EAA leadership is accessible and transparent in its internal decision-making processes as well as its dealings with the

public. Elfreth's Alley remains closely involved in the historic community of Philadelphia. Thousands of school children visit the Alley on school-organized trips every year, from schools all over New Jersey, Pennsylvania and Delaware. However, being deprived of necessary information about historic sites, especially local sites which they regard as their own, can lead them to withdraw support already committed to a site, as in the general withdrawal of support from the Robert E. Lee Boyhood Home after the announcement of its private sale in 2000. The clandestine way in which the LJEF conducted the sale created a rift in the historic community of Alexandria and lasting bitterness between former volunteers and the board of directors. The acrimony, some of which still exists seven years later may been prevented had the board of directors established a policy of communication in the previous thirty years.

The issue of ownership also has an impact on the success or failure of a house museum in terms of its ability to maintain self-sufficiency while protecting its collections—furniture, woodwork, decorative arts and other movable elements—appropriately.⁴⁶ However, in the United States, house museums are not a part of the popular historic vocabulary. Adults with disposable income, children and leisure time are the primary patrons of these types of historic sites,

⁴⁶ Kanawati Thesis, pg. 29

a relatively small slice of the population. The tremendous growth in historic heritage tourism has led to an oversaturation in the house museum market, connected with an increase in historic house visitation. But this increase is skewed toward larger, more well known museums, while smaller museums, such as the three examined in the following case studies, receive a much smaller portion of the total number of house museum visitors yearly.

In every privatization, the interior of a historic house is removed from public view, perhaps forever as the private occupants alter the interior to their own needs and tastes. The responsibility then falls on the staff and directors of the house museum, of whatever size or condition, to catalogue and organize the collections within the house and to deal transparently with each other and with the public in regard to the storage and disposition of the collections and artifacts, before, during and after any decision to begin the process of selling the house, before it completely disappears from the public eye and from the oversight of its Friends association (if any) and local preservation groups. Regardless of the public benefit, LJEF members have only injured themselves by failing to make their case to their members and the public for the privatization of their property, the preservation of which had previously been so important to their mission. They could have utilized concerned citizens as allies and

created a network of support to make the transition much easier for all concerned. The staff and volunteers at Arlington House across the street, the birthplace of Robert E. Lee, could have become natural allies as well, if given the opportunity to offer their input and resources to the Lee-Jackson Foundation when it faced difficulties.

The Lee-Jackson Foundation re-named itself the Lee-Jackson Education Foundation in October, 2002 and used the sale proceeds to fund college scholarships for high school students from Virginia. They also have special funds set aside to assist doctoral candidates specializing in Civil War history.⁴⁷ The program is announced by letters sent to local school districts annually. The LJEF gives away \$70,000 in scholarships yearly, which constitutes about ten percent of the total assets. Their overhead and administration costs are extremely low, as the Foundation only employs one part-time assistant, whose primary responsibility is to respond to correspondence, e-mails and phone calls on behalf of the board of directors and occasionally direct media and research inquiries to the appropriate parties.⁴⁸

One of the traditional tasks of house museum administration has always been the dissemination of information, which can take the form of keeping the board of directors informed of problems that

⁴⁷ Virginia Department of Education Memo No. 137. October 4, 2002.

⁴⁸ Personal communication, President John Ackerly, 21 February 2008, 12 April 2008

arise, making sure there are plenty of materials available at the door for visitors and notifying the public of new projects and ongoing financial needs. This dissemination is vital, because without free access to information, there is no reason for a house museum to exist. The free flow of information --or lack thereof-- can impact the potential of house museums as well as other types of historic sites. Many of the most successful sites that contain residential structures, such as Arlington House, a National Park Service site, and Colonial Williamsburg, operated by a non-profit foundation, spend a considerable percentage of their budget and manpower on publicity as well as extensive, frequently-updated websites. Investment in public outreach may be an indicator of why some organizations operating house museums weather changes successfully while others do not. Communication and public outreach seem to be have been given short shrift in organizations such as the Lee-Jackson Educational Foundation and had been ignored even before the upheaval of privatization in 2000. The Lee-Jackson Educational Foundation apparently never established an official website for the Robert E. Lee Boyhood Home; this seems to be only one facet of their refusal to communicate with or educate the public about any of their activities before their decision to dissolve their tacit agreement to hold the site in trust. This refusal has had a lasting effect on their perceived integrity

as an organization, their participation in the historic community of Alexandria and the future of historic preservation in the state of Virginia. Their house museum closed, but their responsibilities as educators and stewards of history continue. That responsibility can take varied forms, such as using their remaining resources to promote historic preservation in Virginia and their experience with privatization to assist other preservation groups who may be struggling with similar challenges. However, "stonewalling" the public limits their options for directing the future of the foundation. It could also prevent them from acting as effective advocates for historic preservation in Virginia.

However, in the other two cases reviewed, the privatization process went very differently, but ultimately benefited both organizations. Elfreth's Alley was able to re-focus on its core mission of preservation and prevent its administration and staff from becoming overextended by trying to act as landlords and preservationists simultaneously. Instead, the EAA is able to focus its resources and manpower on being stewards of Philadelphia's history and in this, they have been very successful. Elfreth's Alley is one of the most popular historic attractions in the Philadelphia area, attracting not only thousands of schoolchildren on organized field trips, but also thousands of casual visitors, who participate in a wide variety of seasonal events. The popularity of the site has helped bring restaurants

and shops into the area. With its professional management staff, core of dedicated volunteers and a meticulously preserved site, Elfreth's Alley has many opportunities for future development.

Carter's Grove Plantation's privatization was more complex, not only because of all of the later building additions to the original 1750 plantation, but because of the need to ensure that the whole complex of land and buildings were protected and conserved as much as possible as a privately owned farm and residence. Because of the transparency of the year-long privatization process, the sale was welcomed by the public as a positive step towards financial stability and a newly re-focused mission for the Colonial Williamsburg Foundation. Whatever Mr. Minor and his family ultimately decide to do to develop the property, its historic and archaeological resources will be watched over carefully by preservation professionals from the Virginia Outdoors Foundation, the Virginia State Historic Preservation Office and the National Trust for Historic Preservation. With all of that help close at hand, the future of the former plantation is assured.

Interviews

Telephone interview with John Ackerly, President of the Lee-Jackson Educational Foundation, February 20, 2008

Phone interview with Ross Bradford, easements lawyer for the National Trust for Historic Preservation, March 17, 2008

Interview by e-mail with Letitia Grant, President of the Lees of Virginia Association and member of the Friends of the Lee Boyhood Home, March 17, 2008

Personal interview with Donna Ann Harris, principal, Heritage Consulting, Inc. and author of New Solutions for House Museums, January 18, 2008

Personal interview with Cory Kegerise, Executive Director of the Elfreth's Alley Association, October 19, 2007

Telephone interview with Wendy Musumeci, Easements Program Supervisor, Virginia Department of Historic Resources. January 23, 2008

Interview by e-mail with Bill Seefeldt, Jr., former docent,
Robert E. Lee Boyhood Home 1998-2000 and creator of
www.leeboyhoodhome.com, February 19, 2008 and April 12, 2008

Telephone interview with Thomas H. Taylor, Director of
Architectural Collections Management, Colonial Williamsburg
Foundation. January 28 and 29, 2008

Bibliography

"General Robert E. Lee, Richmond, Va." *American Buildings*, no.44 (2 v., Unknown).

Elfreth's Alley Official Site. www.elfrethsalley.org (accessed 8/21/2007).

Unknown. "21st-Century Ideas for 18th-Century Site: Readers Offer some Suggestions for the Future of Colonial Williamsburg's Historic Carter's Grove Plantation." *Daily Press*, Newport News, VA (10/29/2006).

Colonial Williamsburg Foundation Press Release. "Colonial Williamsburg Foundation to Proceed with Protected Sale of Carter's Grove." Williamsburg, VA: 2006.

"EDITORIAL: Respectful Reuse: CW's Solution Will Protect Carter's Grove and the Historic Area." *Daily Press* Newport News, VA 12/17/2006.

"Archaeology Museum Opens Near Williamsburg." *American History Illustrated* 26, no. 5 (1991/11//Nov/Dec 1991).

Library of Congress, Prints and Photographs Division. *Historic American Buildings Survey (HABS) Report: Carter's Grove, VA. 2007*
<http://hdl.loc.gov/loc.pnp/hhh.va0654>

"Honoring Martin's Hundred." *Archaeology* 42, no. 5
(1989/09//Sep/Oct. 1989)

Associated Press. "'Carter's Grove Sold for \$15.3 Million"
www.wdbj7.com/global (accessed 1/07/2008).

Bargmann Hendrie + Archetype, Inc. *Potts-Fitzhugh House 607
Oronoco Street, Alexandria, VA Historic Structures Report. 2000*

Boulton, A. O. "The House of Many Layers." *American Heritage*
43, no. 3 (1992/05//May/June)

Brown, Patricia Leigh. "Restoring a Past some would Bury." *New
York Times*, 9/12/1988.

Byrne, Karen. "We have a Claim on this Estate: Remembering
Slavery at Arlington House." *Crm*: 25, no. 4 (2002): 27-29.

Cooper, Elizabeth. "'Preservation-Minded Buyers Only'." *Virginia
Business*, 12/2007.

Dinan, Stephen. "Lee Home's Owners Mull Selling House." *The
Washington Times*, 4/52000.

Drummond, Daniel F. "Group Seeks Resources to Buy Lee Boyhood Home." *The Washington Times*, 4/28/2000.

Drummond, Daniel F. "Lee's Boyhood Home Won't Reopen as Museum." *The Washington Times*, 9/15/2000.

Editors of American Heritage Magazine. "Carter's Grove, Williamsburg, VA and Robert E. Lee Boyhood Home, Alexandria, VA." *American Heritage Guide: Historic Houses of America Open to the Public*, edited by Beverley Da Costa. 1st ed., p. 299-300, p. 286-287. New York, New York: American Heritage Publishing Co., 1971.

Harris, Donna Ann. *New Solutions for House Museums: Ensuring the Long-Term Preservation of America's Historic Houses*. Lanham, MD: AltaMira Press, 2007.

Hume, Ivor Noël. *Martin's Hundred*. 1st ed. New York: Knopf, 1982.

Hume, Ivor Noël. "Digging for Carter's Grove". *Colonial Williamsburg Archaeological Series*; no. 8. Williamsburg: Va., Colonial Williamsburg Foundation, 1974.

Kanawati, Dina. "Founding Or Funding: Are Historic House Museums in Trouble?" Thesis, Master of Science in Historic Preservation, University of Pennsylvania, 2006.

Kimball, Fiske. "Carter's Grove Plantation, the Robert E. Lee Boyhood Home." In *Domestic Architecture of the American Colonies and of the Early Republic*. 3rd ed. New York, New York: Dover Publications, Inc., 1966.

Kostelny, Elizabeth. *APVA Executive Director's Statement on the Sale of Carter's Grove*. 2006.

Lancaster, Robert Alexander. *Historic Virginia Homes and Churches*. J.B. Lippincott and Co. Philadelphia and London: 1915.

Lee, W. Duncan. "The Renaissance of Carter's Grove on the James River, Virginia, Now the Home of Mr. and Mrs. Archibald M. McCrea." In *Architecture*. 1933, Vol. 67, no, 185-194.

Leone, Mark P. "Exhibition Reviews." *Journal of American History* 79, no. 3 (12, 1992): 1082-1087.

McLean, Steve. "Carter's Grove Real Estate Listing." www.mcleanfaulconer.com (accessed 8/18/2007).

McNatt, Linda. "18th-Century Carter's Grove Mansion to Go on Block." *The Virginian-Pilot*, Norfolk, VA 12/09/2006.

Mizejewski, Gerald. "Owners Hear Pitches for Lee's Boyhood Home." *The Washington Times*, 5/12/2000.

National Trust for Historic Preservation. *Robert E. Lee Boyhood Home Request for Proposals*. Alexandria, VA: 2000.

O'Connell, Kim A. "Lee's Arlington Estate Undergoes Restoration." *America's Civil War* 20, no. 3 11-11. 2007

O'Hanlon, Ann. "Earley Approves Lee Home Restoration; Alexandria Couple Plans to Open House for Events." *The Washington Post*, Washington, D.C. 5/18/2001, sec. METRO.

O'Hanlon, Ann "Deadline Nears for Preserving Lee Home; Owners Seek Buyers to Reopen Museum." *The Washington Post*, 7/29/2000.

O'Hanlon, Ann. "Family Agrees to Sell Back Lee's Home ; Museum would Reopen." *The Washington Post*, 4/4/2000.

O'Hanlon, Ann. "Panel Backs Couple's Plan to Renovate Lee's Alexandria Home." *The Washington Post*, 9/15/2000.

O'Hanlon, Ann. "'Sold' Sign on Lee House Jarring; Foundation Sells General's Boyhood Home to Private Owner." *The Washington Post*, 3/7/2000.

O'Hanlon, Ann. "Two Groups Submit Bids to Restore Lee Home."
The Washington Post, 8/1/2000.

Petkofsky, Andrew. "Carter's Grove Plantation Will be Sold."
Richmond Times-Dispatch, Richmond VA 12/9/2006.

Rathgeb, Jody. "Lee's Boyhood Home Faces Uncertain Future."
Civil War Times Illustrated 39, no. 4: 16. 8/2000

Reklaitis, Victor. "Colonial Williamsburg Plans to Sell Historic
Plantation." *The Daily Press*, Newport News, VA 12/09/2006.

Reklaitis, Victor. "A Little Grove Action." *The Daily Press*, Newport
News, VA 03/31/2006.

Reklaitis, Victor. "A Popular Revolution: Colonial Williamsburg
Chief Gives Encouraging Attendance Numbers, and also Talks about
Carter's Grove and New Facilities." *The Daily Press*, Newport News, VA
5/11/2006.

Rozhon, Tracie. "Homes Sell, and History Goes Private. (Cover
Story)." *New York Times* 156, no. 53810 1-19 12/31/2006.

Schwartz, Maurice H. "Privatization: An Overview." *The George
Wright Forum* 22, no. 1: 2005 : (accessed 8/16/2007).

Shrout, Tom. "CW Markets Carter's Grove with Protective Covenants." Colonial Williamsburg Foundation.
http://www.colonialwilliamsburg.com/foundation/press_release/displayPressRelease.cfm?pressReleaseId=655 (accessed 8/31/2007)

Smith, Sabra. "Dead Men Tell no Tales: How can Creative Approaches to Communication Keep Historic Sites from Going Silent?" Thesis, Master of Science in Historic Preservation, University of Pennsylvania School of Design, 2007.

Starr, Mark. "The Meaning of Privatization." *Yale Law and Policy Review* no. 6 (1988): 6.

Toto, Christian. "Gains made Over Lee Home ; Protesters Find Groups Willing to Run Museum." *The Washington Times*, 4/2/2000.

Toto, Christian. "Lee's Home Will be Repaired while a New Buyer is Sought." *The Washington Times*, 4/12/2000.

Vaughan, Steve. "'Cleaning Up". *The Virginia Gazette*, Williamsburg, VA 12/22/2007.

Virginia Board of Historic Resources, Colonial Williamsburg Foundation, Virginia Outdoors Foundation. "Carter's Grove Easement", Edited by Christopher T. Albert, Esq., Hunton & Williams LLP. Richmond, VA: Virginia Board of Historic Resources, 2007.

Washington, Michelle. "Carter's Grove Mansion Sells for \$15.3 Million". *The Virginian-Pilot*, 2007.

Waterman, Thomas. *The Mansions of Virginia, 1706-1776*. University of North Carolina Press, Chapel Hill, NC: 1946.

Weeks, Kay D. and Grimmer, Anne E. "The Secretary of the Interior's Standards for the Treatment of Historic Properties." http://www.nps.gov/history/hps/tps/standguide/overview/choose_treat.htm (accessed 8/2007)

Wertime, R. A. "Interference and Whimsy at Carter's Grove." *Archaeology* 45, no. 1 (01, 1992): 66.

Whiffen, Marcus. *The Eighteenth-Century Houses of Williamsburg: A Study of Architecture and Building in the Colonial Capital of Virginia*. New York, Holt, Rinehart and Winston. 1970.

Zimmerman, Nicholas. "'CNET Founder Pays \$15.3M for Carter's Grove'." *The Daily Press*, Newport News, VA 2007.

Index

- Bulfinch, Charles 37
- Burwell, Carter, 29
- Carter, Robert "King", 29
- Carter's Grove, 14, 27, 28, 29, 31, 33, 54
- Colonial Williamsburg, 13, 14, 28, 30, 31, 32, 33, 34, 52, 56, 57, 59, 62, 63
- Colonial Williamsburg Foundation, 14, 32, 33, 34, 35, 57, 59
- communication, 9, 11, 14, 17, 21, 44, 49, 51
- Corotoman Plantation, 29. *See* Carter's Grove Plantation
- co-stewardship agreement, 7
- easements, 22, 24, 32, 34
- Elfreth's Alley, 18, 19, 20, 21, 22, 25, 48, 53, 55
- Elfreth's Alley Association, 22
- Fitzhugh, William, 38
- Government Assistance, 6
- historic community, 3, 36, 39, 44, 45, 49, 53
- Lee-Jackson Foundation, 39, 51
- Lee-Jackson Educational Foundation. *See* Lee-Jackson Foundation
- Lee, Robert E., 38
- Lemon Hill Mansion, 16
- Mill at Anselma, 15
- Minor, Halsey 32, 33
- National Trust for Historic Preservation, 40, 46, 54, 55, 61
- Potts-Fitzhugh House. *See* Robert E. Lee Boyhood Home
- Preservation Alliance for Greater Philadelphia, 23
- Privatization, 4
- privatization, definition of, 5
- Problems in Programming, 13
- Robert E. Lee Boyhood Home, 36, 40, 43, 45, 46, 47, 49, 52, 56, 59, 60, 61
- Virginia State Historic Preservation Office, 34, 54
- Virginia Outdoors Foundation, 32, 34

